

# **Name and Address User Guide**



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### ***Pathway 3.09 (Thick Client Version)***

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# Overview



Name and Address is the central register of names and addresses which can be accessed by all applications.

The Name and Address System is a core application which provides the ability to create and modify information associated with names and addresses.

This includes user definable communication and information details (e.g. phone numbers, ACN number), user definable address formats and a link to memos.

The Name and Address records may be added, modified and copied through the Land Information options as required, creating role type links for the name records. These role types and their associations can be viewed for each name via Central Name and Address or the Land Information functions.

The use of the address templates enables the accuracy and speed of address entry to be improved as all components are created and linked via a parameter option. The Housekeeping functions include duplicate name merge and formatted name and address rebuild options.

# Parameters

The Parameters section describes the set up and maintenance of parameters to be used by the Name and Address application as well as across other applications.

The following topics are covered in this section:

[Name and Address System Parameters](#)

[Name Title Parameters](#)

[Case Conversion Exceptions](#)

[Information Type Parameters](#)

[Communication Type Parameters](#)

[Role Type Parameters](#)

[Address Qualifier Parameters](#)

[Address Component Maintenance](#)

[Address Template Parameters](#)

[Person/Company Name Category](#)

[Name and Address Security](#)

[Contact Type Parameters](#)

# Name and Address System Parameters

This section governs the use of Name and Address at the system level. If no overriding options are defined, the default nominated here will be used.

## Name and Address System Parameters Form

This form establishes parameters that govern the use of Name and Address at the system level. Case conversion of names occurs during the entry of a new name.

If Case Conversion options are changed after the system is in use then the Housekeeping options should be run to apply the new conversion rules to existing names, addresses or components.

**Name and Address System Parameters**

**Case Conversion Options**

Surname Case: Capitalise  
Given Names Case: Capitalise  
Company Name Case: All Upper Case

**Formatting Options**

Deceased Attachment: The Estate of the late ☒ Prefix ☐ Suffix  
Mailing Name: Title, Initials, Surname  
Personal Salutation: Given Name, Surname  
Company Salutation: Sir/Madam

**Sequencing Options**

File "Mc" with "Mac" ☒

**Number of Matching Characters to Identify Duplicates**

Surname: 4  
Given Names: 1  
Company Name: 50

**Unknown Address Template**

Template: 100 >> Unknown Address

**Responsibility**

Structure: NAME >> Name and Address

OK Cancel

Name and Address System Parameters Form

### Surname

This field determines how the Surname is to be presented. Three options are available from the drop down list.

- ☐ Capitalise

- ☐ All Upper Case
- ☐ No Case Conversion

“Capitalise” will assign a capital letter as the first character in each word of the surname entered regardless of how the entry was typed. (Case conversion exception words will be ignored.)

“All Upper Case” will convert the entry to all upper case regardless of how the entry was typed. (Case conversion exception words will be ignored.)

“No Case Conversion” will not perform any conversion processing and the entry will be stored as was typed. (Case conversion exception words will be ignored.)

The "Capitalize" case conversion process has been changed for names that contain an apostrophe followed by an S and names that contain a special character as the first letter of a word.

Prior to this change the following case conversion would have been performed:

1) A surname of "o'shea" would have been correctly converted to "O'Shea".

2) A company name of "jim's mowing" would have been incorrectly converted to "Jim'S Mowing".

The corrected case conversion is "Jim's Mowing".

3) A company name of "esprit (retail) pty ltd" would have been incorrectly converted to "Esprit (retail) Pty Ltd".

The corrected case conversion is "Esprit (Retail) Pty Ltd".

4) A company name of "o'shea's irish pub (dublin)" would have been incorrectly converted to "O'Shea'S Irish Pub (dublin)".

The corrected case conversion is "O'Shea's Irish Pub (Dublin)".

### **Given Names**

This field determines how the Given Name is to be presented. Three options are available from the drop down list.

- ☐ Capitalise
- ☐ All Upper Case
- ☐ No Case Conversion

“Capitalise” will assign a capital letter as the first character in each word of the given name entered regardless of how the entry was typed. (Case conversion exception words will be ignored.)

“All Upper Case” will convert the entry to all upper case regardless of how the entry was typed. (Case conversion exception words will be ignored.)

“No Case Conversion” will not perform any conversion processing and the entry will be stored as was typed. (Case conversion exception words will be ignored.)

### **Company Name**

This field determines how the Company Name is to be presented. Three options are available from the drop down list.

- ☐ Capitalise
- ☐ All Upper Case
- ☐ No Case Conversion

“Capitalise” will assign a capital letter as the first character in each word of the company name entered regardless of how the entry was typed. (Case conversion exception words will be ignored.)

“All Upper Case” will convert the entry to all upper case regardless of how the entry was typed. (Case conversion exception words will be ignored.)

“No Case Conversion” will not perform any conversion processing and the entry will be stored as was typed. (Case conversion exception words will be ignored.)

The "Capitalize" case conversion process has been changed for names that contain an apostrophe followed by an S and names that contain a special character as the first letter of a word.

Prior to this change the following case conversion would have been performed:

- 1) A surname of "o'shea" would have been correctly converted to "O'Shea".
- 2) A company name of "jim's mowing" would have been incorrectly converted to "Jim'S Mowing".  
The corrected case conversion is "Jim's Mowing".
- 3) A company name of "esprit (retail) pty ltd" would have been incorrectly converted to "Esprit (retail) Pty Ltd".  
The corrected case conversion is "Esprit (Retail) Pty Ltd".
- 4) A company name of "o'shea's irish pub (dublin)" would have been incorrectly converted to "O'Shea'S Irish Pub (dublin)".  
The corrected case conversion is "O'Shea's Irish Pub (Dublin)".

### Deceased Attachment

This field allows entry of a prefix/suffix to attach to the formatted name and salutation. A formatted name rebuild may need to be run when changes are made to this field.

### Prefix/Suffix

Check one of these buttons to indicate if the Deceased Attachment is to be a prefix or a suffix.

### Mailing Name

This field determines how a Mailing Name is to be presented. A Mailing Name can consist of a combination of Title, Given Name(s) or Initials and Surname. The Mailing Name format will be utilised during the printing of Name and Address Labels. Four options are available from the drop down list.

- Given Name, Surname (e.g. Fred John Bloggs)
- Title, Given Name, Surname (e.g. Mr Fred John Bloggs)
- Initials, Surname (e.g. F J Bloggs)
- Title, Initials, Surname (e.g. Mr F J Bloggs)

### Personal Salutation

Seven options are available from the drop down list

- Given Name, Surname (e.g. Fred John Bloggs)
- Title, Given Name, Surname (e.g. Mr Fred John Bloggs)
- Initials, Surname (e.g. F J Bloggs)
- Title, Initials, Surname (e.g. Mr F J Bloggs)
- Given Name (e.g. Fred)
- Title, Surname (e.g. Mr Bloggs)
- No Automatic Formatting As Keyed

### Company Salutation

This field is user definable

### File "Mc" with "Mac"

If this box is checked on, when names are presented in a list then Surnames beginning with Mc and Mac will be displayed together in alphabetical order. If this box is checked off then normal alphabetical rules will apply. (i.e. Mc listed after Mac). If this checkbox option is changed after the system is in use, the Housekeeping options will need to be run to apply the new sequencing.

### Number of Matching Characters to Identify Duplicates

Nominate the number of characters for Surname, Given Name and Company Names that determine when possible duplicate name records would be displayed during the addition of a new name.

For example

If 5 was entered for the Surname then duplicate matching would not be prompted unless the first five characters of a new name record matched with an existing name record.

Possible duplicate names may be selected or ignored during the addition of a new name. The Number of matching characters can be left blank if no duplicate matching is required, or up to 50 characters can be used in the matching process.

### Unknown Address Template

Provision has been made for the addition of 'Unknown Address' records where it is necessary to enter a Name record without knowledge of the current associated address.

The first step is the creation of an 'Unknown Address' template. This is achieved using the Address Template Line Maintenance form. A template should be created specifying one or more of the Prefix fields and/or the Identifier field only; the template must not specify any Address Components. The example below shows the specification of such a template:

The 'Address Template Line Maintenance' form displays the configuration for a template named 'Unknown Address' with ID '999'. The form is organized into three sections for defining different parts of the template:

- Prefix Section:**
  - Before Separator: Space
  - Prefix Description: Address
  - Prefix Default Value: Unknown Address
  - Case Conversion: No Conversion
  - Next Separator: Space
  - Mandatory: ☒
- Identifier Section:**
  - Before Separator: Space
  - Identifier Description: Comments
  - Identifier Default Value: (empty)
  - Case Conversion: No Conversion
  - Next Separator: Space
  - Mandatory: ☐
- Component Section:**
  - Before Separator: Space
  - Sequence: 10
  - Component Type: (empty)
  - Case Conversion: (empty)
  - Next Separator: (empty)
  - Mandatory: ☐
  - Relations: (empty)

Buttons at the bottom include 'Sequence', 'Insert', 'OK', and 'Cancel'.

Next, the 'Unknown Address' template must be specified as a Name and Address Parameter. This is the step that actually identifies a template as the 'Unknown Address' template so that it can be used in the Address Maintenance process.

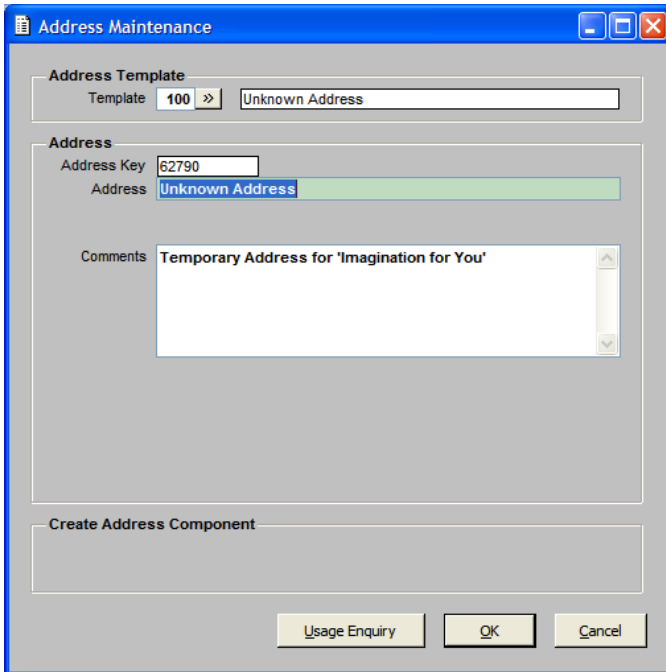
An 'Unknown Address' record can be created at the Address Search Profile level by selecting the relevant template and invoking the New button.

The 'Address Search Profile' form shows the configuration for a search profile. Under the 'Search Profile Selection' section, the 'Template' is set to '999' and 'Unknown Address'. The 'Search Profile' section contains the following fields:

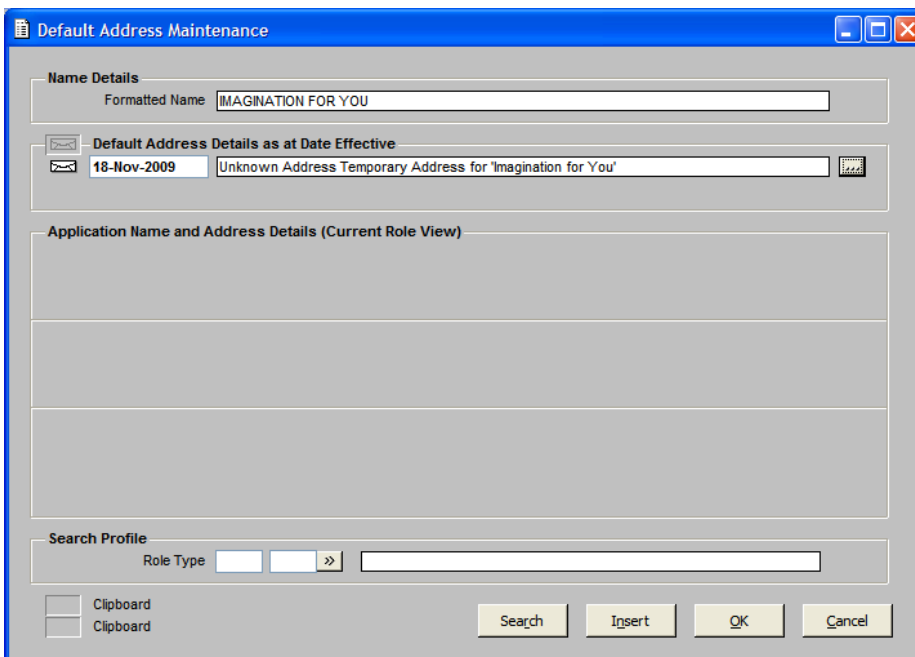
- Address Key: (empty)
- Address: UNKNOWN ADDRESS
- Comments: (empty)

Buttons at the bottom include 'New', 'Search', and 'Cancel'.

When the Address Maintenance form is presented the record can be modified if required and subsequently saved via the OK button.



The 'Address Maintenance' dialog box is used for managing address templates and components. It features a title bar with standard window controls. The main area is divided into several sections: 'Address Template' with a 'Template' dropdown set to '100' and a text field containing 'Unknown Address'; 'Address' with an 'Address Key' field set to '62790' and an 'Address' field containing 'Unknown Address'; and 'Comments' with a text area containing 'Temporary Address for 'Imagination for You''. At the bottom, there is a 'Create Address Component' section and three buttons: 'Usage Enquiry', 'OK', and 'Cancel'.



The 'Default Address Maintenance' dialog box is used for managing default address details. It features a title bar with standard window controls. The main area is divided into several sections: 'Name Details' with a 'Formatted Name' field containing 'IMAGINATION FOR YOU'; 'Default Address Details as at Date Effective' with a date field set to '18-Nov-2009' and a text field containing 'Unknown Address Temporary Address for 'Imagination for You''; and 'Application Name and Address Details (Current Role View)' with a large empty text area. At the bottom, there is a 'Search Profile' section with a 'Role Type' dropdown and a text field, and four buttons: 'Search', 'Insert', 'OK', and 'Cancel'.

An 'Unknown Address' record can be stored against a name until such time as the 'Known' address can be entered. Then it is a simple matter of maintaining the address, changing the template, and replacing the existing details with the new address details.



**Default Address Maintenance**

**Name Details**  
Formatted Name: IMAGINATION FOR YOU

**Default Address Details as at Date Effective**  
18-Nov-2009 59 King William Road, Hyde Park SA 5034

**Application Name and Address Details (Current Role View)**

**Search Profile**  
Role Type: [ ] [ ] >> [ ]

☐ Clipboard  
☐ Clipboard

Search Insert OK Cancel

Also, an 'Unknown Address' record can be created at the Address Maintenance form level by changing the selected template to the appropriate template.

### Responsibility Structure

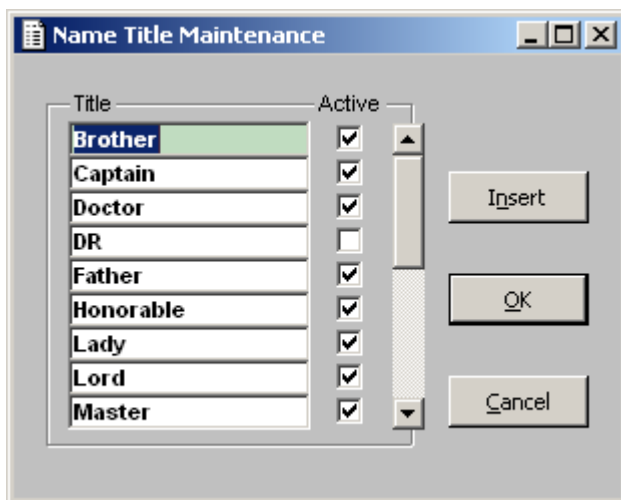
This is the default responsibility structure used for Names and Address.

## Name Title Parameters

This section determines the Name Titles that are available for the system. E.g. Mr. Mrs, Miss.

### Name Title Maintenance Form

This form allows the establishment of Name Titles that are available to the system. Titles may be created, maintained, deleted or disabled from this form.



Title	Active
Brother	<input checked="" type="checkbox"/>
Captain	<input checked="" type="checkbox"/>
Doctor	<input checked="" type="checkbox"/>
DR	<input type="checkbox"/>
Father	<input checked="" type="checkbox"/>
Honorable	<input checked="" type="checkbox"/>
Lady	<input checked="" type="checkbox"/>
Lord	<input checked="" type="checkbox"/>
Master	<input checked="" type="checkbox"/>

Buttons: Insert, OK, Cancel

*Name Title Maintenance Form*

#### Title

This field contains the Description for each Name Title. This Description can make up part of the formatted name if required (Refer to System Parameters).

#### Active

If this box is checked on then the Name Title is available to be linked to new or existing names.  
If this box is checked off then the Name Title is no longer available to the system. Any name record using this title will remain as entered. Any new name records created will not have the title available for selection.

## Case Conversion Exceptions

This section establishes those words that do not have the standard case conversion formatting rules applied (as established in the Name and Address System Parameter).

The formatting rule applied here will override that established at the system level.

### Case Conversion Exception Maintenance Form

This form establishes the words that do not have the standard Case Conversion Formatting rules applied.

Exception Word	Case Conversion Rule
AND	Lower Case
BOX	All Upper Case
DE	Lower Case
III	No Case Conversion
LE	Lower Case
MACHINERY	No Case Conversion
IISW	No Case Conversion
OF	All Upper Case
OR	No Case Conversion

Buttons: Insert, OK, Cancel

*Case Conversion Exception Maintenance Form*

#### Exception Word

This field contains the word to which the overriding rule is applied.

Note: To prevent the 's' being capitalised following an apostrophe (e.g. John'S Bakery), a Case Exception rule may be defined. To do this, enter the following in The Case Conversion Exception Maintenance form:

<u>Exception Word</u>	<u>Case Conversion Rule</u>
S	No Case Conversion

#### Case Conversion Rule

This field contains the overriding conversion rule required for the exception word. Four options are available from the drop down list.

- ☐ Lower Case
- ☐ All Upper Case
- ☐ First Character Lower Case
- ☐ No Case Conversion

If Lower Case is selected then the nominated word will be converted to all lower case.

If All Upper Case is selected then the nominated word will be converted to all upper case.

If First Character Lower Case is selected then the first character of the nominated word will be converted to lower case. Case conversion on the rest of the word is not performed.

If No Case Conversion is selected then no conversion is performed by the system and the word remains as entered by the operator.

Note: To prevent the 's' being capitalised following an apostrophe (e.g. John'S Bakery), a Case Exception rule may be defined. To do this, enter the following in The Case Conversion Exception Maintenance form:

<u>Exception Word</u>	<u>Case Conversion Rule</u>
S	No Case Conversion

## Information Type Parameters

This section describes the establishment of all Information Types that are available to the system.

An Information Type allows the recording of free format text against a name record. An unlimited number of Information Types may be established. New Information Types may be established at any time.

Information Types may be applied to both Person and Company Names, Personal Names only or Company Names only.

### Information Type Maintenance Form

This form allows the establishment of Information Types that are available to the system. The Sequence button enables the Sequence of the Information Types to be amended. This enables the more common Information Types to display first, on the Name and Address Maintenance form.

Information Type	Applies To	Entry Format	Active
ABN	Person & Company		<input checked="" type="checkbox"/>
Australian Company No	Company Name		<input type="checkbox"/>
Builder's Licence No	Person & Company		<input checked="" type="checkbox"/>
Council Areas	Person & Company		<input checked="" type="checkbox"/>
Drivers License	Personal Name	&#####	<input checked="" type="checkbox"/>
Employee Number	Personal Name		<input checked="" type="checkbox"/>
Inactive Info Type	Person & Company		<input type="checkbox"/>
Line of Business	Company Name		<input checked="" type="checkbox"/>
LSL Agency Code	Person & Company		<input checked="" type="checkbox"/>

Sequence Insert OK Cancel

*Information Type Maintenance Form*

#### Information Type

This field contains the heading for the Information Type that will be displayed in maintenance and enquiry. The first 18 characters of the heading will display in Name and Address maintenance.

#### Applies To

This field contains the name type to which this Information Type is available. The following selections are available from the drop down menu.

- ☐ Personal Name
- ☐ Company Name
- ☐ Person and Company

If Personal Name is selected then this Information Type is only available to name records of the type "Person".

If Company Name is selected then this Information Type is only available to name records of the type "Company".

If Person and Company is selected then this Information Type is available to both "Person" and "Company" name records.

#### Entry Format

This field allows a format template to be specified, if desired, to restrict data entry to certain characters or numbers.

The following input masks are available:-

Mask Entry	Description
#	This mask will force the user to enter a numeric value in each position designated in the mask e.g. ## will force an entry of 2 significant digits i.e. 34.
&	An ampersand in this field allows any character input, either letter or symbol
*	An asterisk in this field allows any alpha-numeric input.
?	Indicates that the field requires the entry of a single alphanumeric character. For every question mark in the Entry Format field the user is required to enter a character. For example, ??? requires the input of 3 alphanumeric characters.
.	A decimal point in this field will force a user to enter a decimal point e.g. ##.## 44.50
DATE	This mask will force the user to enter a valid date in the field.
Any other alpha numeric character	If any other character is placed in the Entry Format field then that character is required. For example if the entry format is A? then the user is required to enter a single alphanumeric character, followed by an A, followed by another single alphanumeric character e.g. BAG. The characters entered are case sensitive.

The masks may be used in combination with each other (except for the date mask).

e.g. ##,A\* The user must input two numbers, a comma, an A and any other characters.

### Active

If this box is checked on then the Information Type is available to the system.

If this box is checked off then the Information Type is no longer available to the system. Any name record using this Information Type will remain as entered. The Information Type will no longer be available for addition to any name record.

### Sequence Button

By pressing the Sequence button, Information Types can be re-sequenced into the order required to display when adding a new Personal or Company Name.

## Information Type Sequence Maintenance Form

This form enables the order of Information Types to be amended using the 'Move Up' and 'Move Down' Buttons. This will be the order that the Information Types display within Name and Address Maintenance. If no Sequencing is established, the Information Types will appear in alphabetical sequence.

**Information Type Sequence Maintenance**

Personal Information Types	Company Information Types
Builder's Licence No	Council Areas
Employee Number	Line of Business
Council Areas	Builder's Licence No
Drivers License	Surveyor's Registrat. No
Surveyor's Registrat. No	LSL Agency Code
LSL Agency Code	Uniface 7
Uniface 7	ABN
ABN	Position Description
Position Description	

Move Up (↑) Move Down (↓)

OK Cancel

Information type Sequence Maintenance Form\

### Personal Information Types

This field will display a list of the current Personal Information Types. By pressing the Move Up and Move Down Buttons, the order of the list can be amended. The Information Types will be displayed in this order within Personal Name Maintenance.

### Company Information Types

This field will display a list of the current Company Information Types. By pressing the Move Up and Move Down Buttons, the order of the list can be amended. The Information Types will be displayed in this order within Company Name Maintenance.

### Move Buttons

By pressing the Move Buttons, the sequence of the Information Types may be changed. The column which is re-sequenced is the column which has the current focus.

For example

To move the Personal Information Types, ensure that one of the Personal Information Types is highlighted and use the Move arrows to re-sequence.

## Communication Type Parameters

This section describes the establishment of all Communication Types that are available to the system.

A Communication Type allows the recording of free format text against a name record. An unlimited number of Communication Types may be established. New Communication Types may be established at any time.

Communication Types may be applied to both Person and Company Names, Personal Names only or Company Names only.

### Communication Type Maintenance Form

This form allows the establishment of Communication Types that are available to the system. The Sequence button enables the Sequence of the Communication Types to be amended. This enables the more common Communication Types to display first, on the Name and Address Maintenance form.

Communication Type	Applies To	Entry Format	Active
After Hours Number	Company Name		<input checked="" type="checkbox"/>
Alternate Phone Number	Personal Name		<input checked="" type="checkbox"/>
Business E-mail address	Company Name		<input checked="" type="checkbox"/>
Business Fax Number	Person & Company		<input checked="" type="checkbox"/>
Business Phone Number	Person & Company		<input checked="" type="checkbox"/>
com 1	Person & Company		<input checked="" type="checkbox"/>
Comm 2	Person & Company		<input checked="" type="checkbox"/>
Comm 3	Person & Company		<input checked="" type="checkbox"/>
Comm 4	Person & Company		<input checked="" type="checkbox"/>

Sequence Insert OK Cancel

*Communication Type Maintenance Form*

#### Communication Type

This field contains the heading for the Communication Type that will be displayed in maintenance and enquiry. The first 18 characters of the heading will display in Name and Address maintenance.

#### Applies To

This field contains the name type to which this Communication Type is available. Three options are available from the drop down menu.

- ☐ Personal Name
- ☐ Company Name
- ☐ Person and Company

If Personal Name is selected then this Communication Type is only available to name records of the type "Person".

If Company Name is selected then this Communication Type is only available to name records of the type "Company".

If Person and Company is selected then this Communication Type is available to both "Person" and "Company" name records.



### Entry Format

This field allows a format template to be specified, if desired, to restrict data entry to certain characters or numbers.

The following input masks are available:-

Mask Entry	Description
#	This mask will force the user to enter a numeric value in each position designated in the mask e.g. ## will force an entry of 2 significant digits i.e. 34.
&	An ampersand in this field allows any character input, either letter or symbol
*	An asterisk in this field allows any alpha-numeric input.
?	Indicates that the field requires the entry of a single alphanumeric character. For every question mark in the Entry Format field the user is required to enter a character. For example, ??? requires the input of 3 alphanumeric characters.
.	A decimal point in this field will force a user to enter a decimal point e.g. ##.## 44.50
DATE	This mask will force the user to enter a valid date in the field.
Any other alpha numeric character	If any other character is placed in the Entry Format field then that character is required. For example if the entry format is A? then the user is required to enter a single alphanumeric character, followed by an A, followed by another single alphanumeric character e.g. BAG. The characters entered are case sensitive.

The masks may be used in combination with each other (except for the date mask).

e.g. ##,A\*      The user must input two numbers, a comma, an A and any other characters.

### Active

If this box is checked on then the Communication type is available to the system.

If this box is checked off then the Communication Type is no longer available to the system. Any name record using this Communication Type will remain as entered. The Communication Type will no longer be available for addition to any name record.

### Sequence Button

By pressing the Sequence button, the Communication Types can be re-sequenced into the order required to display when adding a new Personal or Company Name.

## Communication Type Sequence Maintenance Form

This form enables the order of Communication Types to be amended using the Move Up and Move Down Buttons. This will be the order that the Communication Types display within Name and Address Maintenance.

If no Sequencing is established, the Communication Types will appear in alphabetical sequence.

The maintenance functions within Name and Address allow the default sequence for Communication Types and Information Types to be overridden.

The sequence of the Communication Types and Information Types can be overridden in three places.

- Against an individual name (Person or Company)
- Against a particular name Role Type
- Against a particular role record (e.g. for a Property Owner role)

If there is no override, the sequence is determined from the Name and Address parameters against Communication Types and Information Types.

The concept of Default Communication Type Details and Default Information Type Details for a name in the context of a particular role type is the result. The default for a given name is the one that appears first in the sequence. What this means to a user of a module that has names linked is that the Names Maintenance/Enquiry forms within each module now show the Default Communication Details along with the name details. This saves the additional step of having to open the name form to find the details required to contact the person or company.

The following module's Names Maintenance/Enquiry forms display the Default Communication Details if they exist:

- Customer Service Module Links Maintenance
- Register Module Details Maintenance
- Workflow Task Maintenance
- Animal Maintenance
- Animal Owner Maintenance
- Applications/Licensing Names Maintenance
- Infringements Summary (excluding Parking Infringements)
- Property Names Maintenance
- Rates/Debtors/Water Billing Names Maintenance
- Victorian Valuations Lease Names Maintenance
- Victorian Valuations Objection Details Maintenance

The Default Communication Type Details and the Default Information Type details can be extracted during the generation of documents with Word Processing.

The maintenance of individual Personal and Company names within Name and Address allows the sequencing of Communication and Information Type details. Menu options are available from the Edit menu to restore the default order for when that is required. The labels for Communication Types and Information Types indicate whether the order you are seeing is the default order or a changed order.

The Application Mailing Name Maintenance form includes an option for overriding the sequence for an individual role. This is accessible from the Address button on the name and then the name button on the individual role you want to override. If an override exists for the role, the option will display in bold.

The Name Role Type maintenance form contains two options for overriding the sequence at the Role Type level. If either option is bold, an override exists.

From Name and Address enquiry, the ability to perform sequencing of Communication Types and Information Types is not available.

#### **Additional Notes:**

The sequence established in the Communication/Information Type Sequence Maintenance Form is regarded as the Default Sequence. This sequence will be used in all Name Records, unless it is overridden for a particular Name record (e.g. John Smith). In this case the Communication Types label for John Smith will indicate it is a Changed Sequence.

When John Smith is added to an Application (e.g. as a Builder) the sequence of Communication Types will display as per his Name record. (Changing the sequence again via his Personal Name Maintenance record will change the sequence in the Name record).

If the user wishes to change the sequence of Communication/Information Details for the Applications Role record ONLY (and not have it changed in the Name Record) then the user should proceed as follows:

1. In Name and Address Maintenance
2. Search for the name John Smith
3. Select the Address button to display the Role records for John Smith
4. Detail out on the Name line of the Builder Role Record
5. Select the 'Personal Name Role Detail Sequence' button
6. The Communication/Information Details may be resequenced here

Four Extract fields, "Document\_Applicant\_Comm\_D", "Document\_Default\_Comm\_Descr", "Document\_Applicant\_Info\_D" and "Document\_Default\_Info\_Descr" are available to extract this information into a document.

The fields "Document\_Applicant\_Comm\_D" and "Document\_Applicant\_Info\_D" will extract the default Communication Type and the default Information Type details for the identity that is listed first (if there is more than one recipient for the document) against the document.

The fields "Document\_Deft\_Comm\_Descr" and "Document\_Deft\_Info\_Descr" will extract the description of the Communication and Information Types that the extracted information belongs to.

*Communication Type Sequence Maintenance Form*

### **Personal Communication Types**

This field contains a list of the current Personal Communication Types. By pressing the Move Up and Move Down Buttons, the order of list can be amended. The Communication Types will be displayed in this order within Personal Name Maintenance.

### **Company Communication Types**

This field contains a list of the current Company Communication Types. By pressing the Move Up and Move Down Buttons, the order of the list can be amended. The Communication Types will be displayed in this order within Company Name Maintenance.

### **Move Buttons**

By pressing the Move Buttons, the sequence of Communication Types can be changed. The column which is re-sequenced is the column which has the current focus.

For example

To move the Personal Communication Types, ensure that one of the Personal Communication Types is highlighted and use the Move arrows to re-sequence.

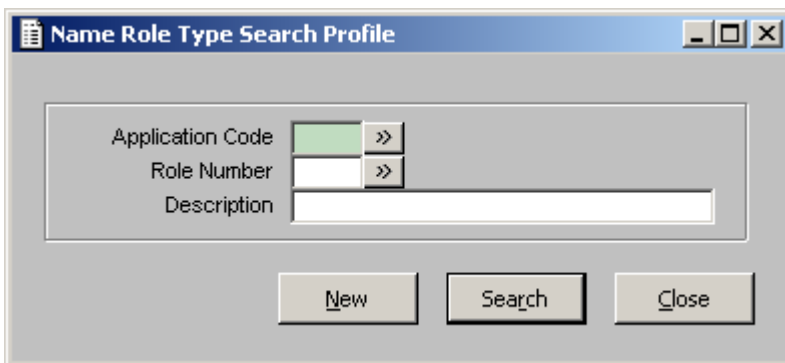
## Role Type Parameters

This section defines all the Role relationships which exist between Name and Address and the various Application modules. These Role Types are system defined, with limited details available for maintenance.

### Name Role Type Search Profile Form

This form enables you to select all Role Types matching a certain criteria. The extraction of existing Role Types require the entry of a search criteria and the use of the Search button.

Refer to the How to Use Reference guide for further information regarding Advanced search profile techniques. This guide can be accessed from the HELP option - How To Use



*Name Role Type Search Profile Form*

#### Application Code

Enter an Application Code on which to base your search and use the Search button to initiate the search. Application codes may be selected using the pop-up button. The search will then be based on the nominated Application code.

For example

An Application code of LPA will search only on Property related Role Types.

#### Role Number

Enter a Role Number to further qualify the Application code search and identify a single Role Type. The Search button should be used to initiate the search.

For example

An Application code of LPA with a Role Number of 0 will select the Property Owner Role Type.

#### Description

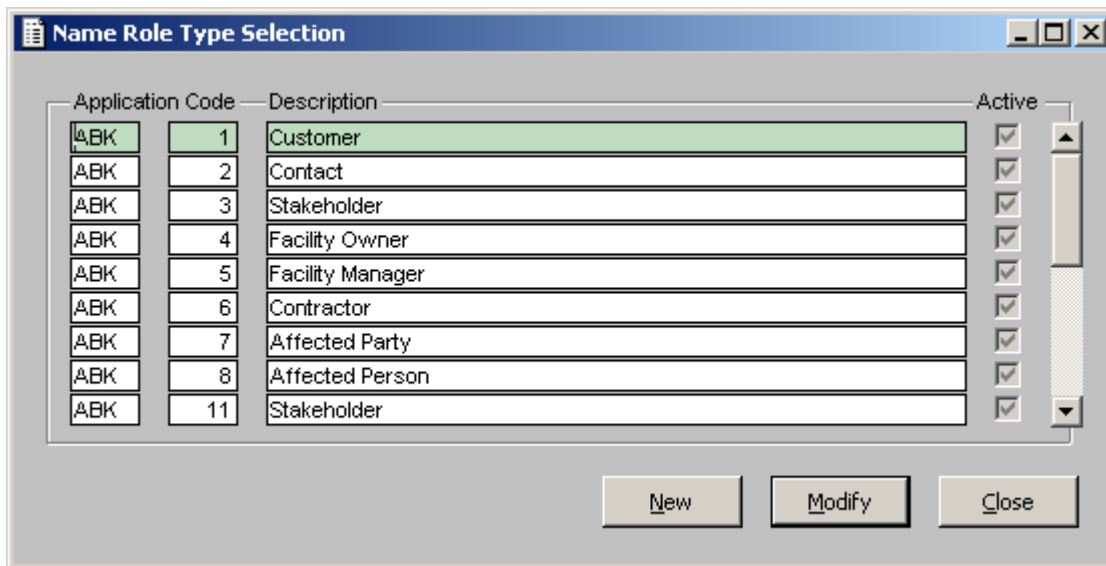
Enter a Description on which to further qualify your search and use the Search button to initiate the search. Wild card searching is available.

For example

A Description of Owner will select all Application owners (i.e. Property and Applications).

### Name Role Type Selection Form

This form will display where the search criteria matches more than one Name Role Type. From this form you may create a new User defined Role Type or select one of the listed Role Types for modification.



The screenshot shows a software window titled "Name Role Type Selection". It contains a table with three columns: "Application Code", "Description", and "Active". The "Application Code" column lists codes: ABK, ABK, ABK, ABK, ABK, ABK, ABK, ABK, ABK, and ABK. The "Description" column lists roles: 1 Customer, 2 Contact, 3 Stakeholder, 4 Facility Owner, 5 Facility Manager, 6 Contractor, 7 Affected Party, 8 Affected Person, and 11 Stakeholder. The "Active" column contains checkboxes, all of which are checked. Below the table are three buttons: "New", "Modify", and "Close".

Application Code	Description	Active
ABK	1 Customer	<input checked="" type="checkbox"/>
ABK	2 Contact	<input checked="" type="checkbox"/>
ABK	3 Stakeholder	<input checked="" type="checkbox"/>
ABK	4 Facility Owner	<input checked="" type="checkbox"/>
ABK	5 Facility Manager	<input checked="" type="checkbox"/>
ABK	6 Contractor	<input checked="" type="checkbox"/>
ABK	7 Affected Party	<input checked="" type="checkbox"/>
ABK	8 Affected Person	<input checked="" type="checkbox"/>
ABK	11 Stakeholder	<input checked="" type="checkbox"/>

*Name Role Type Selection Form*

### Application Code

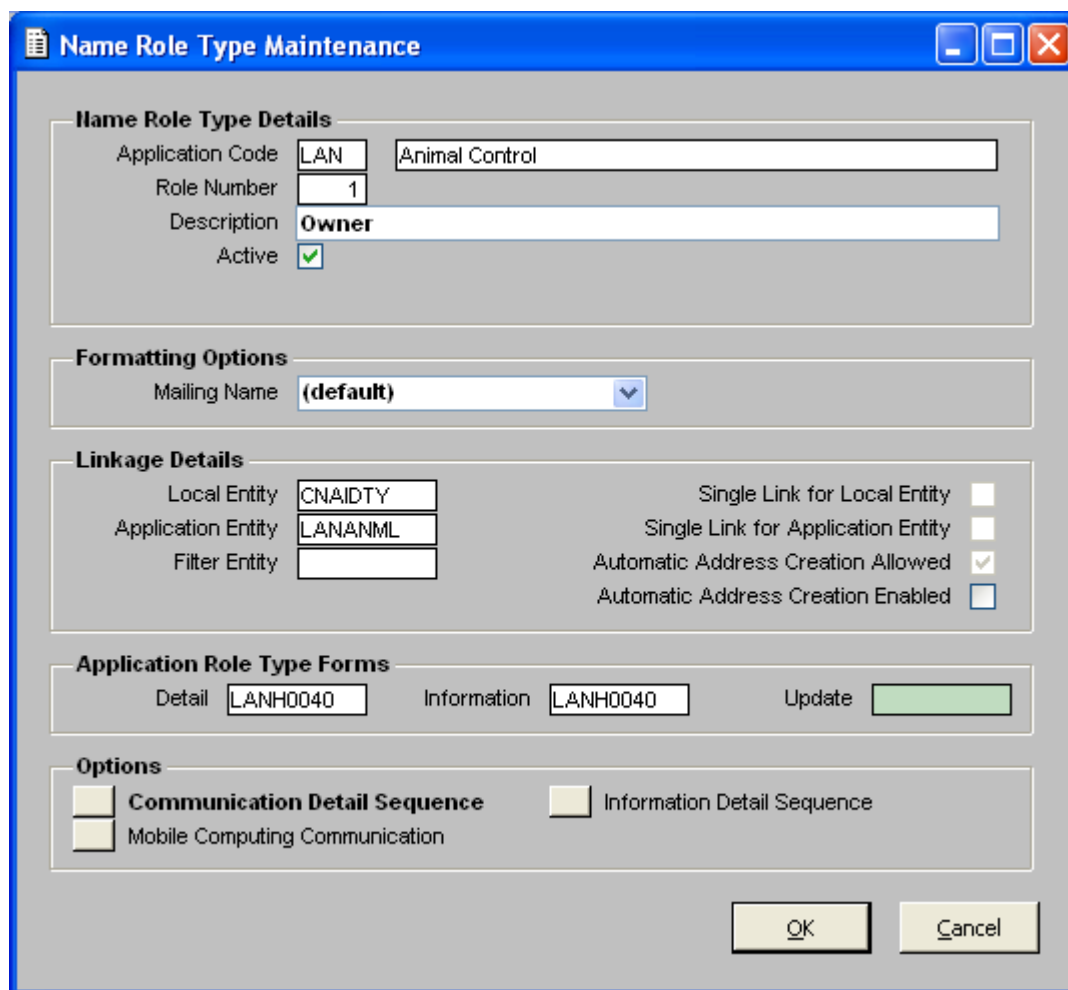
This field contains the Application Codes for each Role Type identified by the search criteria. Click on a Role Type and select the Modify button to amend an existing Role Type. The Role Type Application codes are system defined and cannot be amended.

### Description

This field contains a further Description of each Application Code, for each Role Type identified by the search criteria.

## Name Role Type Maintenance Form

This form enables maintenance of selected Name Role Type details.



**Name Role Type Maintenance**

**Name Role Type Details**

Application Code: LAN    Animal Control

Role Number: 1

Description: Owner

Active: ☒

**Formatting Options**

Mailing Name: (default) ▼

**Linkage Details**

Local Entity: CNAIDTY    Single Link for Local Entity: ☐

Application Entity: LANANML    Single Link for Application Entity: ☐

Filter Entity:    Automatic Address Creation Allowed: ☒

Automatic Address Creation Enabled: ☐

**Application Role Type Forms**

Detail: LANH0040    Information: LANH0040    Update:

**Options**

☐ Communication Detail Sequence    ☐ Information Detail Sequence

☐ Mobile Computing Communication

OK    Cancel

Name Role Type Maintenance Form

**Application Code**

This field contains the Application Code and Description for the selected Role Type. The Application Code is system defined and cannot be amended. If adding a user defined Role Type, the Pop Up button can be used to select an Application Code.

**Role Number**

This field contains the Role Number for the selected Role type. The Role Number is system defined and cannot be amended. If adding a user defined Role Type, the Role Number must be greater than or equal to 100.

**Description**

This field contains the Description for the selected Role Type. The Description is an Alpha numeric 50 character field which may be amended for Role Types as required. If adding a user defined Role Type, enter the appropriate Description.

**Active**

If this box is checked on it indicates that the selected Role Type is currently available for linking via the various Applications.

**Reciprocal Role**

This field displays for selection a drop down list of reciprocal roles which are attached to the selected Role Type. This field is only available in the CNA application.

**Formatting Options - Mailing Name**

This field determines how the Mailing Name will display for Application related names. Five options are available from the drop down list

- ☐ (Default) - System Parameter formatting is assumed
- ☐ Given Name, Surname
- ☐ Title, Given Name, Surname
- ☐ Initials, Surname
- ☐ Title, Initials, Surname

**Linkage Details - Local Entity**

This field contains the local entity to which the link relates. This field is system defined and cannot be maintained by the user.

**Linkage Details - Application Entity**

This field contains the application entity to which the link relates. This field is system defined and cannot be maintained by the user.

**Linkage Details - Filter Entity**

This field contains the entity within the application which determines the filter value. (This field is currently not in use). This field is system defined and cannot be maintained by the user.

**Single Link for Local Entity**

This check box will be checked on to specify that a name can only use a role type once. E.g. Mrs Smith can only be assigned a Borrower role type once. This parameter is defined at system level and cannot be maintained by the user.

**Single Link for Application Entity**

This check box will be checked on if the role type e.g. Standard Applicant or Borrower, can only have one name. This parameter is defined at system level and cannot be maintained by the user.

**Automatic Address Creation Allowed**

This field determines whether automatic address creation is allowed for a particular role type. This flag is set up within Name and Address System Parameter Maintenance.

**Automatic Address Creation Enabled**

If this flag is checked on, the system will automatically create new mailing addresses from the Property Address without prompting the user.

When the Property Names Maintenance form is used to attach a new name to a property, the 'Automatic Address Creation Enabled' setting on the Role Type determines whether a Mailing Address based on the Property Address is automatically created and attached to the new name.

When a new Property Owner is created the name is automatically assigned a default Mailing Address based on the Property Address. The Identifier field on the new Mailing Address is derived from the Property Address components defined in the 'Default House Number Format' specified on the "Property Administration Parameter Maintenance" form.

The mapping of Property Address components on each Property Address Format is controlled by the Mailing Address components defined on the default Address Template. This mapping overrides the "Default House Number Format" to Mailing Address Identifier mapping and enables the automatic population of the Mailing Address Prefix fields. If the default Address Template does not have any Address Prefix fields defined or there is no requirement to populate these Prefix fields during Automatic Mailing Address creation, then the Mailing Address Identifier field will be populated based on the "Default House Number Format" when a new mailing address is automatically created.

**Detail Form**

This field defines the Detail form name. The Detail Form is system defined information relating to the selected Role Type. This information cannot be amended.

**Information Form**

This field defines the Information form name. The Information Form is system defined information relating to the selected Role Type. This information cannot be amended.

**Update Form**

This field defines the Update form name. The Update Form is system defined information relating to the selected Role Type. This information cannot be amended.

**Delete Form**

This field defines the Delete form name. The Delete Form is system defined information relating to the selected Role Type. This information cannot be amended.

**Source Entity**

This field defines the Source Entity form name. The Source Entity is system defined information relating to the selected Role Type. This information cannot be amended.

**Options – Communication Detail Sequence**

Selection of the Option button will display the Role Type Communication Type Sequence Maintenance Form which enables the sequencing of Communication Types for this particular Role Type. The label will be bolded if the sequence has been changed from the default.

**Options – Information Detail Sequence**

Selection of the Option button will display the Role Type Information Type Sequence Maintenance Form which enables the sequencing of Information Types for this particular Role Type. The label will be bolded if the sequence has been changed from the default.

**Options – Mobile Computing Communication**

Selection of the Option button will display the Communication Type Selection Form which enables the selection of Communication Types, to be exported to Mobile Computing for this particular Role Type.

**Role Type Communication Type Sequence Maintenance Form**

This form allows the Communication Types to be ordered in a particular sequence for a particular Role Type.

*Role Type Communication Type Sequence Maintenance form*

**Application Code**



These fields contain the Application Code and Description for the selected Role Type.

### Role Number

This field contains the Role Number for the selected Role Type.

### Description

This field contains the Description for the selected Role Type.

### Personal Communication Types

This field contains a list of the current Personal Communication Types. By pressing the Move Up and Move Down Buttons, the order of list can be amended. The Communication Types will be displayed in this order for the Role Type which is being maintained.

### Company Communication Types

This field contains a list of the current Company Communication Types. By pressing the Move Up and Move Down Buttons, the order of list can be amended. The Communication Types will be displayed in this order for the Role Type which is being maintained.

### Move Buttons

By pressing the Move Buttons, the sequence of Communication Types can be changed. The column which is re-sequenced is the column which has the current focus.

For example

To move the Personal Communication Types, ensure that one of the Personal Communication Types is highlighted and use the Move arrows to re-sequence.

## Role Type Information Type Sequence Maintenance Form

This form allows the Information Types to be ordered in a particular sequence for a particular Role Type.

**Role Type Information Type Sequence Maintenance**

**Name Role Type Details**

Application Code: LAP      Application: \_\_\_\_\_

Role Number: 0

Description: Applicant

**Personal Information Types**

- Builder's Licence No
- Employee Number
- Council Areas
- Drivers License
- Surveyor's Registrat. No
- LSL Agency Code
- Uniface 7
- ABN
- Position Description

**Company Information Types**

- Council Areas
- Line of Business
- Builder's Licence No
- Surveyor's Registrat. No
- LSL Agency Code
- Uniface 7
- ABN
- Position Description

Move

OK      Cancel

*Role Type Information Type Sequence Maintenance Form*

### Application Code

These fields contain the Application Code and Description for the selected Role Type.

**Role Number**

This field contains the Role Number for the selected Role Type.

**Description**

This field contains the Description for the selected Role Type.

**Personal Information Types**

This field contains a list of the current Personal Information Types. By pressing the Move Up and Move Down Buttons, the order of list can be amended. The Information Types will be displayed in this order for the Role Type which is being maintained.

**Company Information Types**

This field contains a list of the current Company Information Types. By pressing the Move Up and Move Down Buttons, the order of list can be amended. The Information Types will be displayed in this order for the Role Type which is being maintained.

**Move Buttons**

By pressing the Move Buttons, the sequence of Communication Types can be changed. The column which is re-sequenced is the column which has the current focus.

For example

To move the Personal Communication Types, ensure that one of the Personal Communication Types is highlighted and use the Move arrows to re-sequence.

**Mobile Computing Communication Type Maintenance**

The Mobile Computing Communication Type Maintenance form allows the selection of Communication Types that will be exported to Pathway Mobile Computing. Any 'Assigned' Communication Types will be exported to Mobile Computing.

Note: The animal ownership communication details to be displayed by the Animal Search are determined by the Communication Types selected via this form. Select the "Name and Address Register >> Name and Address Parameters >> Role Type Parameters" menu option. Perform a search and select the "LAN 1 = Animal Ownership" role. Select the "Mobile Computing Communications" option and assign the communication types to be displayed by the Mobile Computing Animal Search.

**Mobile Computing Communication Type Maintenance**

**Name Role Type Details**

Application Code: LAN    Animal Control

Role Number: 1

Description: Owner

**Available**

- After Hours Fax Number
- Barlows test Info Type
- Business Fax Number
- CPP Number
- Contact Date
- Contact Email
- Contact Name
- Contact Phone
- Contact Position

**Assigned**

- After Hours Phone Number
- Business Phone Number
- Home Phone Number
- Mobile Phone Number
- Phone
- Telephone Number

OK    Cancel

*Mobile Computing Communication Type Maintenance form*

### **Name Role Type Details**

These fields contain the Application Code, Role Number and Description for the selected Role Type.

### **Available**

The Available side lists the Communication types which are available for assigning to Mobile Computing.

### **Assigned**

The Assigned side of the form lists any Communication Types which have been assigned to be exported to Mobile Computing.

## Address Qualifier Parameters

This section establishes the Address Qualifiers that are available to the system. E.g. Road, Street, Avenue. These qualifiers ensure data integrity when recording addresses. New qualifiers may be created at any time.

### Address Component Qualifier Maintenance Form

This form allows the establishment of the address qualifiers that are available to the system and their abbreviations. The Qualifier abbreviations are utilised in the display of the Formatted Address and are available when searching on Address details.

Qualifier	Abbreviation	Active
Alley	Al	<input checked="" type="checkbox"/>
Arcade	Arc	<input checked="" type="checkbox"/>
Avenue	Ave	<input checked="" type="checkbox"/>
Avenue North	Ave Nth	<input checked="" type="checkbox"/>
Boulevard	Blv	<input checked="" type="checkbox"/>
Circuit	Cc	<input checked="" type="checkbox"/>
Close	Cl	<input checked="" type="checkbox"/>
Court	Crt	<input checked="" type="checkbox"/>
Crescent	Crs	<input checked="" type="checkbox"/>

Buttons: Insert, OK, Cancel

*Address Component Qualifier Maintenance form*

#### Qualifier

This field contains the description that will be displayed in maintenance and enquiry.

#### Abbreviation

This field contains the abbreviation of the description that will be displayed in the maintenance and enquiry Formatted Address.

#### Active

If this box is checked on then the qualifier is available to the system.

If this box is checked off then the qualifier is no longer available to the system. Any address record using this qualifier will remain as entered. The qualifier will no longer be available for addition to any address record. The Component Qualifier Pop Up Form, which can be accessed via Parameter or Maintenance options, displays only Active Component Qualifiers to be selected.

## Address Component Maintenance

This section establishes all components that formulate an Address. E.g. Street, Suburb, Postcode. A Default set of six component types are available. Components cannot be added or deleted from this default set.

For each component established its allowable entries are nominated. In the case of a Street component then all Street Names would be entered under this component type.

### Address Component Type Maintenance Form

This form allows the establishment of each of the individual Component Types that will be available to the system.

Component	Description	Component Case	Use Qualifier	Active	Components
1	Street	Capitalise	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	...
2	Suburb	All Upper case	<input type="checkbox"/>	<input checked="" type="checkbox"/>	...
3	City	Capitalise	<input type="checkbox"/>	<input checked="" type="checkbox"/>	...
4	State	All Upper case	<input type="checkbox"/>	<input checked="" type="checkbox"/>	...
5	Post Code	Capitalise	<input type="checkbox"/>	<input checked="" type="checkbox"/>	...
6	Country	Capitalise	<input type="checkbox"/>	<input checked="" type="checkbox"/>	...

OK Cancel

Address Component Type Maintenance Form

#### Component

This field contains a unique number that identifies the component type. This field does not determine the order in which components are displayed in an address. The Component numbers are system defined and cannot be maintained.

#### Description

This field contains the Description of the component. This Description will appear on maintenance and enquiry forms.

#### Component Case

This field determines the Case Conversion requirements for each component. The following selections are available from the drop down list.

- ☐ Capitalise
- ☐ All Upper Case
- ☐ No Conversion

If Capitalise is selected then each word within the component will be capitalised.

If All Upper Case is selected then all text for the component will be converted to upper case.

If No Conversion is selected then the data entered will remain as input by the operator.

#### Use Qualifier

If this box is checked on then the Qualifier (as described earlier) will be required. For example the Street Component would have the Qualifier box checked on to enable the input of the street type e.g. Road.

### Active

If this box is checked on then the component is available to the system.

If this box is checked off then the component is no longer available to the system. Any address record using this component will remain as entered. The component will no longer be available for addition to any address record.

### Components

By pressing the detail button, you will be able to access the "Maintain Components" form to allow the input of the Component values for each Component type.

## Component Maintenance Form

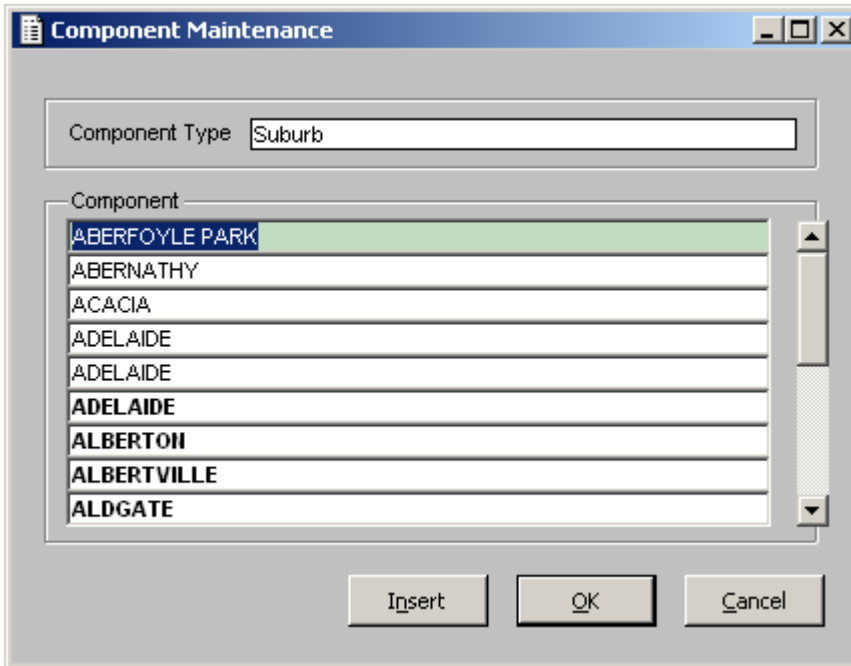
One of two forms will be displayed for this function depending on whether the "Qualifier" field has been checked on or off in the "Maintain Address Component Types" form.

If the Qualifier is checked ON then the following form is displayed. This would typically be for a "Street" component.

*Component Maintenance Form*

**Note:** Components added through Name and Address are bolded and maintainable by the user from this form. Components added via Property are not maintainable.

If the Qualifier is checked OFF then the following type of form is displayed (without the qualifier).



*Component Maintenance Form (B)*

### **Component Type**

This field displays the name of the current Component Type being modified. No modification or deletion of this field is allowed.

### **Component**

This field contains the name of the Component being created or maintained. In the case of maintaining a Street Component Type then this field would represent each Street name. In the case of maintaining a Suburb Component type then this field would represent each Suburb name.

### **Qualifier**

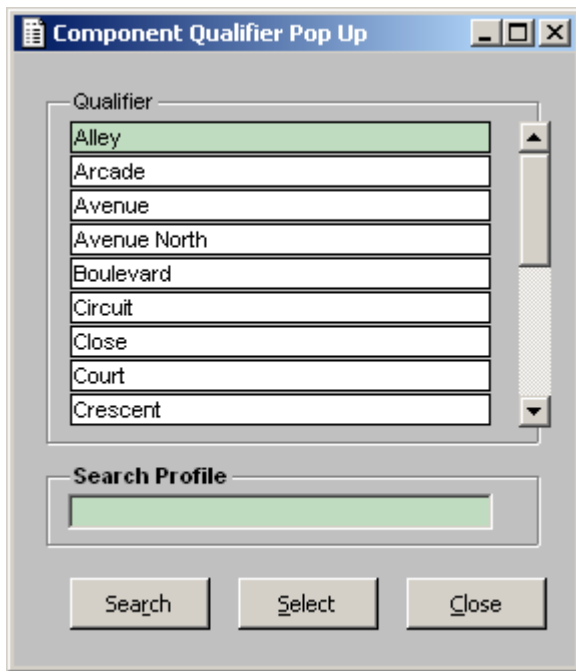
This field is only displayed if the "Qualifier" field on the Component Type is checked on. A valid "Qualifier Type" must be selected when adding a new Component. The Qualifier Pop up button can be utilised to select the required Qualifier.

### **Component Qualifier Popup**

Selection of this Popup Button provides access to the Component Qualifier Pop up Form.

## **Component Qualifier Pop Up Form**

This form enables the selection of a component qualifier from a user defined list. The qualifier can be used on selected components (e.g. Street) to identify the component further (E.g. Road, Avenue etc)

The image shows a Windows-style dialog box titled "Component Qualifier Pop Up". It features a list box labeled "Qualifier" containing the following items: Alley, Arcade, Avenue, Avenue North, Boulevard, Circuit, Close, Court, and Crescent. The "Alley" item is currently selected and highlighted in green. Below the list box is a text input field labeled "Search Profile". At the bottom of the dialog are three buttons: "Search", "Select", and "Close".

*Component Qualifier Pop Up Form*

**Qualifier**

This field contains a list of the available component qualifiers available for selection. Further information on defining Address Component Qualifiers is available in Chapter 2.7 of this user guide.

**Search Profile**

This field can be used to search on a particular component qualifier. Enter a Qualifier on which to base your search and select the Search button. Wildcard searching is available  
For example : S\* will select all Qualifier codes starting with S.



## Address Template Parameters

This section enables the structure of addresses to be defined, according to each of the address components and the relationships between those components.

A Default Template will be issued which contains a standard set of components (Street, Suburb, State, Postcode). The relationships between these components as well as the available components may be amended as required.

Further templates may also be established in addition to the Default, if required. The default template may be overridden during address maintenance.

Each of the individual address components must have been established prior to establishment of the Address Templates.

### Address Template Maintenance Form

This form allows the establishment of Address Templates. The following templates may be created:

- A 'Structured Address' template which has one or more Address Component elements and/or one or more Address Prefix Descriptions defined.
- A 'Free Format Address' template which does not have any Address Prefix Descriptions or Address Component elements defined (useful for international mailing addresses which do not adhere to the Street, Suburb, Town/City, State, Post Code and Country convention)

The Detail button adjacent to each template displays the Address Template Line Maintenance form where Address Template details may be defined.

Template	Description	Active	Lines
1	Australian Residential Address	<input checked="" type="checkbox"/>	...
2	Overseas Template	<input checked="" type="checkbox"/>	...

Insert OK Cancel

*Address Template Maintenance form*

#### Template

This field contains a unique numeric identifier for each template type. The Default template code (1) cannot be amended.

#### Description

This field contains the Description of the Template. This Description will be displayed on maintenance forms. This Description may be maintained on the Default Template if required.

#### Active

If this box is checked on then the address template is available to the system.

If this box is checked off then the address template is no longer available to the system. Any address record using this template will remain as entered. The template will no longer be available for addition to any address record.

### Lines

By pressing the 'Lines' detail button, the "Address Template Line Maintenance" form can be accessed.

## Address Template Line Maintenance Form

This form establishes the available Components and their order of display for the nominated Template.

A 'Structured Address' Template requires the setting up and ordering of the required Address Components and Address Prefixes.

A 'Free Format Address' Template is defined by leaving the form blank (i.e. not defining any Components or Prefixes). Once an address has been defined using a 'Free Format Address' template then the template can no longer be changed to a 'Structured Address' template. (A status message indicating that 'Free Format Addresses exist for the template and therefore the structure of the template cannot be modified' is displayed when this is the case.)

**Note:** The 'Free Format Address' template should only be used for low volume international addresses as many functions within Pathway use the Street, Suburb, State and Post Code components of a 'Structured Address' template to facilitate mail sorting and reduce overall postage costs.

### Address Template Line Maintenance Form

*Address Template Line Maintenance form for a 'Free Format' Address Template*

### Template

This field contains the Description of the template that is currently being maintained. The Description may not be edited on this form. Each Template is allocated a unique number for identification.

### Address Prefix Description

The standard address template allows for forwarding information, property names and unit and level numbers to be entered, separate from the house number range. Three prefixes are available for these purposes. Each prefix is assigned a label identifying its use "Forwarding Information", "Property Name", and "Unit/Level Number". When an address is entered using this template these fields will be available. The use of these prefixes is optional.

### Case Conversion

This field determines how the address prefixes are displayed in the formatted address (e.g. All uppercase, Capitalisation or No conversion).

### Separator

This field determines how the address prefixes are included in the formatted address (e.g. Separated by a comma, New Line, Slash, Space, Double space or Triple Space).

**Note:** Specifying the 'New Line' separator may cause an extra comma to be inserted in the mailing address when created via the Property module.

### Identifier

These fields determine how the Identifier is formatted, (e.g. All uppercase, Capitalised, or No Conversion). The Separator can also be defined (e.g. Comma, New Line, Slash, Space, Double Space or Triple Space).

### Sequence

This field contains the line sequence number. This is the order in which the address components will be displayed.

### Component Type

This field contains the Component Type that will be displayed and its associated Description. When creating a new Template, the Component Type Pop-up form may be utilised to select this Component Type.

### Separator

This field determines how the current component will be separated from the next component. In the case of a Street component type the separator would most likely be a New Line. Six options are available from the drop down list.

- ☐ Comma
- ☐ New Line
- ☐ Slash
- ☐ Space
- ☐ Double Space
- ☐ Triple Space

If Comma is selected then a comma will be placed after the current component.

If New Line is selected then on display of the address the next component will be displayed on a new line.

If Slash is selected then a slash will be placed after the current component.

If Space is selected then a single space will be placed after the current component.

If Double Space is selected then two spaces will be placed after the current component.

If Triple Space is selected then three spaces will be placed after the current component.

### Relations

By pressing the 'Relations' detail button, the "Template Line Relations" Maintenance Form can be accessed.

### Sequence Button

Selection of the Sequence button displays the Address Template Line Sequence Maintenance form to allow sequencing of all Address Components as well as Prefix fields.

## Address Template Line Sequence Maintenance form

This form allows the user to sequence the Address components in any desired order as well as enabling the Address Prefix elements to be sequenced to any position within the formatted address..

**Note:** Some New Zealand postal addresses have a "Rural Delivery" component. This "Rural Delivery" information is entered into one of the Address Prefix fields but needs to be located between the Street and Suburb components within the formatted address. (Prior to this modification this function only allowed the sequencing of Address Components and not the Address Prefix elements.)

*Address Template Line Sequence Maintenance Form*

### Template

These fields display the Address Template which was selected in the Address Template Maintenance form. These fields are display only.

### Include Contact

Within Address Templates, the user and positing of Contact Names must be specified. When the Include Contact checkbox is set ON, this will add a new line to the address template which will include the Contact Details into the formatted address. This line can then be positioned as required within the Address Template Lines as required. In most situations it is envisage that this would be the first line.

### Component

All Address Components associated with the selected Address Template are displayed here along with their associated separator. The user is able to resequence these Components into a different order to suit the desired Formatted Address layout.

### Separator

This field displays the separator which has been assigned to each Address Component. It determines how the current component will be separated from the next component. In the case of a Street component type the separator would most likely be a New Line. One of the following six options will be displayed.

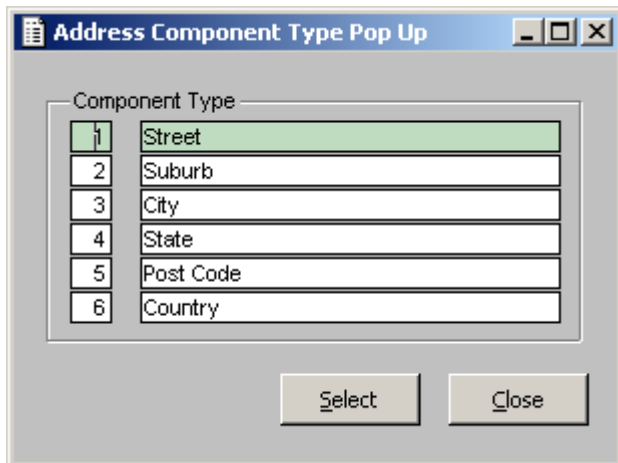
- ☐ Comma
- ☐ New Line
- ☐ Slash
- ☐ Space

- ☐ Double Space
- ☐ Triple Space

Refer to more details under the Separator field (36) of the Address Template Line Maintenance form.

## Address Component Type Pop Up Form

This form contains a list of all the available Component Types. The required Component Types can be selected to define the Address Template as required.

A screenshot of a software window titled "Address Component Type Pop Up". The window has a standard Windows-style title bar with minimize, maximize, and close buttons. Inside the window, there is a section labeled "Component Type" containing a list of six items. Each item consists of a small square box with a number and a text field to its right. The items are: 1 Street (highlighted in green), 2 Suburb, 3 City, 4 State, 5 Post Code, and 6 Country. At the bottom of the window, there are two buttons: "Select" and "Close".

Component Type	
1	Street
2	Suburb
3	City
4	State
5	Post Code
6	Country

*Address Component Type Pop Up Form*

### Component Type

This field contains a list of existing Address Component Types for selection as part of the Address Template, if required.

### Description

This field contains a Description for each Component Type in the list. The Description further identifies each of the Component Type Codes.

## Template Line Relations Maintenance Form

This form enables a relationship between each "line" of an address to be established. Setting these relationships assists in more rapid data entry and less keyboard input by the operator.

**Template Line Relations Maintenance**

**Template Line**  
 Template: Australian Residential Address  
 Line: 2

**Related Line**  
 Line: 1    Street

**Suburb**

ABERFOYLE PARK
ABERNATHY
ACACIA
ADELAIDE
ADELAIDE

**Relations**

OK    Cancel

*Template Line Relations Maintenance form*

Each component “line” may be related to another “line”. A single “line” may have one or more other “lines” associated to it. The way these lines are related should be considered carefully.

In the example below the relationships are established in such a way that if a Suburb is entered via Address Maintenance and only has one State Code and one Post Code associated to it then those fields (State and Postcode) are defaulted automatically. For example if North Adelaide was nominated then SA and 5006 would automatically default to the appropriate fields within the address.

In addition to the above, the example given will also default the Suburb field if a Street only exists in one suburb or where the Street is linked to multiple Suburbs, the display is limited to these Suburbs only.

For example

Assuming four template lines of Street, Suburb, State and Postcode, the following relationships would be recommended to minimise the data entry required.

The Street Template Line is not related to any other template line.

The Suburb Template Line is related to the Street Template Line.

The State Template Line is related to the Suburb Template Line.

The Post Code Template Line is related to the Suburb Template Line.

### Template

This field contains the description of the template currently being maintained. No modification of this field is allowed.

### Template Line

This field contains the line number within the template that is currently being maintained.

E.g. Line 1 - Street Component

### Related Line

This field contains the line number within the template that the current line should be related to.

### Component Description

The label given to this field will change depending on which template line is currently being maintained. All component descriptions that have been established are displayed. In the case of the Street Component all Street names are displayed.

### Component Description Qualifier

If a Qualifier has been used for the current component type then it will be displayed.

For example : Street components will have qualifiers of Street, Avenue, Road etc.

### Relations

By pressing the Detail button , the “Component Relationships Maintenance Form” will display.  
If the current component type has no relationships then the following message will be displayed. “This template line has no related template line”

## Template Line Pop Up Form

This form can be used to select a Component Type as a Related Line to another Component Type  
For example : From the Suburb Line Relations, a Related line of Street may be selected.

Line	Component Type
2	Suburb
3	State
4	Post Code

*Template Line Pop Up Form*

### Line

This field contains a list of all Lines available to be related. No modification or deletion of this field is allowed.

### Component Type

This field contains a further Description of each Line available to be related. No modification or deletion of this field is allowed.

## Component Relationships Maintenance Form

This form establishes the Component Relationships as required. Establishing these relationships will minimise the data entry required in Address Maintenance. By selecting components from the left side of the form and moving them to the right hand side of the form relationships are created. The example given below is the establishment of relationships of “Streets” to a Suburb. In this case “Adelaide” is the suburb and the operator will nominate from the left hand column all streets that exist within the suburb of Adelaide.

*Component Relationships Maintenance Form*

### Component Description From

This field contains the names of the Component that may be associated.

For example : A list of all the Street Components to be associated to a nominated Suburb.

Where applicable, the Component Qualifier (i.e. Street, Road, Avenue) will display alongside the Component

### Select Button



By pressing this button any component selected on the left side of the form is “moved” to the right hand side of the form and consequently “associated”.

### Remove Button



By pressing this button any component selected on the right side of the form is “moved” to the left hand side of the form and consequently “unassociated”.

### Component Description To

This field contains a list of all of the associations for the Component Type described.

For example

A list of the Street components which are linked to a particular Suburb (e.g. Adelaide).

### Show relationships detail

By pressing this Detail button the associations that have already been established for this component are displayed.

### Retrieve Profile

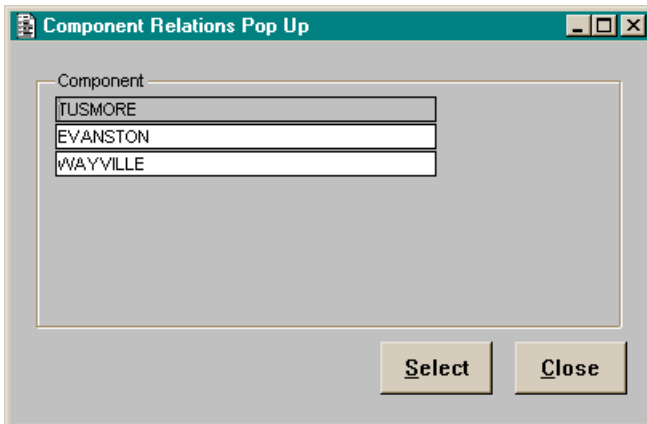
This field can be used to position to a particular Component. Enter a Component on which to base your search and use the Search button to initiate the search. Wild card searching is available.

For example : B\* will select all Components starting with B.

## Component Relations Pop Up Form



Components Relationship Pop Up Form may be displayed where a component such as a Street may appear in more than one suburb. When entering a new address and the street is keyed, if this street appears in more than one suburb, once you tab to the suburb field, the Component Relations Pop Up Form will be displayed with the names of the suburbs that the street name appears in. You are then able to select the particular suburb required.



*Component Relations Pop Up Form*

### **Component**

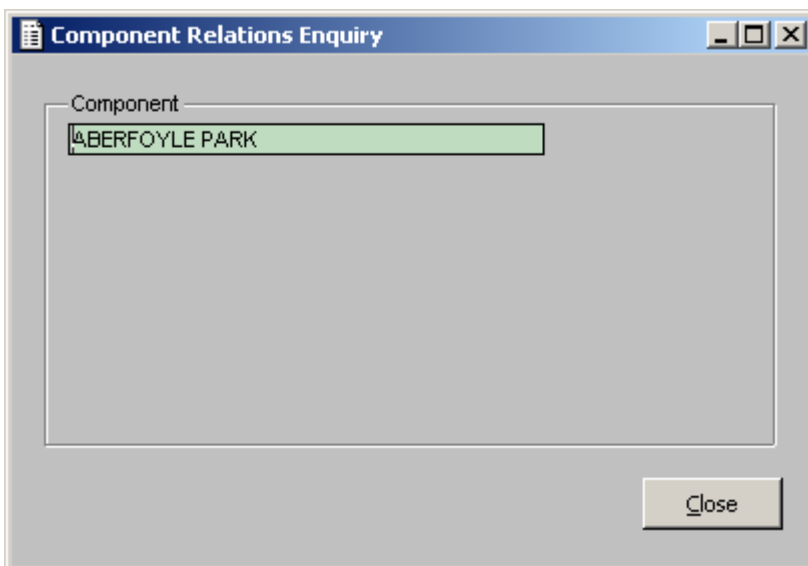
This field contains a list of Components which are related to the selected Component code. You are able to highlight one of the list and click the select button to use this Component.

## **Component Relations Enquiry Form**

This form displays all the Components which have been related to the selected Component. This is an Enquiry only option.

For example

All the streets linked to a particular Suburb.



*Component Relations Enquiry Form*

### **Component**

This field contains a list of Components which are related to the selected Component code. This Component Code is accessed via the Detail button. This is an Enquiry only display.

## Person/Company Name Category Maintenance

Companies may be categorised by a user-defined Company Category. The Company Category Maintenance form allows the user to create, maintain and delete company categories. These categories may then be applied to companies and used as a retrieve profile in the Name Search Profile form. Each Company Category has the following fields:

**Name Category:** A six character code representing the category. This field is mandatory.

**Description:** A full description of the company category. This field is mandatory.

**Active:** A flag which determines whether or not the company category is currently available for new records. This field is mandatory and defaults to true.

Example company categories could include: Registered, Non-Registered, Partnership, Public etc

### Person / Company Name Category Maintenance Form

This function allows Person/Company Name Categories to be set up and maintained.

Name Category	Description	Active
ACN	ASIC Company	<input checked="" type="checkbox"/>
ASSOC	Association	<input checked="" type="checkbox"/>
BC	Body Corpoarte	<input checked="" type="checkbox"/>
COMP	Computer Company	<input checked="" type="checkbox"/>
FC	Foreign Company	<input checked="" type="checkbox"/>
MOTOR	Motor Vehicle Industry	<input checked="" type="checkbox"/>
NEWS	Newsagency	<input checked="" type="checkbox"/>
ORG	Organisation	<input checked="" type="checkbox"/>
REAL	Real Estate Agency	<input checked="" type="checkbox"/>

Buttons: Insert, OK, Cancel

*Company Name Category Maintenance Form*

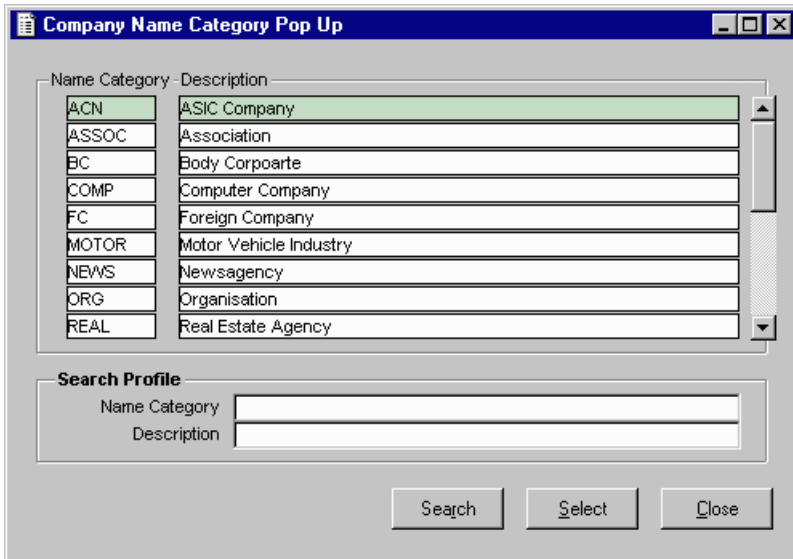
#### Name Category

These fields allow a code of up to 6 characters or numbers and a description to be entered to identify a Person/Company Name Category. (e.g. MAIDEN, RETAIL)

#### Active

If this box is checked on then the component is available to the system. If this box is checked off then the component is no longer available to the system and cannot be used to identify or search on a name.

### Person/Company Name Category Pop Up Form



The image shows a software window titled "Company Name Category Pop Up". It contains a table with two columns: "Name Category" and "Description". The table lists ten categories: ACN (ASIC Company), ASSOC (Association), BC (Body Corporate), COMP (Computer Company), FC (Foreign Company), MOTOR (Motor Vehicle Industry), NEWS (Newsagency), ORG (Organisation), and REAL (Real Estate Agency). Below the table is a "Search Profile" section with two input fields: "Name Category" and "Description". At the bottom of the window are three buttons: "Search", "Select", and "Close".

Name Category	Description
ACN	ASIC Company
ASSOC	Association
BC	Body Corporate
COMP	Computer Company
FC	Foreign Company
MOTOR	Motor Vehicle Industry
NEWS	Newsagency
ORG	Organisation
REAL	Real Estate Agency

**Search Profile**

Name Category

Description

Search Select Close

*Company Name Category Pop Up Form*

### **Name Category**

The Name Category fields contain the Person or Company Name Categories which have been set up in the parameters. These categories serve to further identify a person or company.

### **Search Profile - Name Category and Description**

Enter a Name Category code or description on which to conduct a search. This feature is useful when there are more than nine categories listed.

## Name and Address Security

This function allows different levels of security to be placed on name and address details which will apply at a global level. Any security created at this level will override any application security.

If a user is not a member of the CNA Responsibility Structure then default options will apply.

### Name and Address Security Maintenance Form

This form allows access to each of the security options that are required for this function.

*Name and Address Security Maintenance Form*

#### Structure

The default name and address responsibility structure which is defined in the system parameters.

#### Options

These buttons allow access to default and user authorities which can be created to tailor access to the central name and address records to suit your requirements.

### System Default Role Security Maintenance Form

This form allows default security options to be maintained for individual components of the name and address record.

A security option exists (i.e. 'Other Application Address') to provide full security over addresses when multiple applications are linked.

Note: Whilst an Application can have many Role records, the security will be at the Application level (i.e. LAP, LPA as opposed to Property Owner, Applicant etc).

Security is only invoked when accessing Name and Address from an Application. No single/multi level security applies when using the central maintenance functions.

There are 3 address options. They are as follows:

- Default Address
- Application Address
- Other Application Address

The recommendation of settings and explanations on function are:

Default Address

Single = Maintenance

Multi = Enquiry Only

This will allow access to Default Address for creation of name and when only one Application has links.

#### Application Address

Single = Maintenance

Multi = Maintenance

This will allow creation and maintenance of Application Mailing Address, where it pertains to the Application that has initiated the maintenance (i.e. where the operator has accessed Name and Address from).

#### Other Application Address

Single = Enquiry Only

Multi = Enquiry Only

This function controls access to Application Mailing addresses other than those linked to the Application that initiated the maintenance.

(e.g.: Initiated from Applications, Other Applications will include LAP, LRA, LLC, LAN etc)

If set using the above examples, it will allow operators to maintain their own addresses, with restrictions on accidentally resetting other application or default addresses.

It will still provide visual display of these addresses, but no maintenance will be allowed.

**Note:** Where one Application allows access to different Application Role records, accessing from each Role record will have the effect of being initiated from that Application and hence allow maintenance. An example of this is as follows:

Property displays both Property and Rates role records via Names.

Accessing a Property Name will assume Property and restrict ability to change any other Application Address including Rates, however, the operator will still be able to access the Rate Name from Property Names and be able to maintain the address for the Rate role records.

An example of the security when set as per the recommendations above:

Name: John Citizen

#### Role Records

LPA Owner

LRA Ratepayer

LAP Applicant

LAN Animal Owner

Animal Department receive advice on change of address.

Access Animal Maintenance and Names

Ability to change or add a new Default Address will be removed

Ability to add or change a LAN specific Mailing Address will be allowed

Ability to add or change a Mailing Address for the LPA, LRA, LAP roles will be removed.

The addresses for these Roles can be viewed, but no Detail button will exist.

Item	Single Role Authority	Multi Role Authority
Surname	Maintenance	Maintenance
Given Names	Maintenance	Maintenance
Company Name	Maintenance	Maintenance
Name Type	Maintenance	Maintenance
Title	Maintenance	Maintenance
Sex	Maintenance	Maintenance
Date of Birth	Maintenance	Maintenance
Communication Type	Maintenance	Maintenance
Information Type	Maintenance	Maintenance
Default Address	Maintenance	Maintenance
Application Address	Maintenance	Maintenance
Other Application Address	Maintenance	Maintenance

*System Default Role Security Maintenance Form*

### Item

The individual component of the name and address record to which the security will apply.

### Single Role Authority

If the name and address record is linked to only one role type then the Authority selected here will apply.

Valid values are:

Maintenance
Conditional Maintenance
Enquiry Only
Non-Display

- ☐ Maintenance - the user will be permitted to modify the selected component.
- ☐ Conditional Maintenance - if the component is blank maintenance will be permitted.
- ☐ Enquiry only - the user will only be able to view the selected component
- ☐ Non-Display - the component will not be displayed.

### Multi Role Authority

If the selected record has more than one role type link then the authority selected here will apply.

Valid values are:

Maintenance
Conditional Maintenance
Enquiry Only
Non-Display

- ☐ Maintenance - the user will be permitted to modify the selected component.
- ☐ Conditional Maintenance - if the component is blank maintenance will be permitted.
- ☐ Enquiry only - the user will only be able to view the selected component
- ☐ Non-Display - the component will not be displayed.

## System Default Authorities Maintenance Form

This form allows security to be placed over specific actions. Please note that all Name and Address Security Parameters only apply when the Name and Address Maintenance function is invoked from within another application.

The security parameters do not apply when the Name and Address Maintenance or Address Maintenance functions are invoked directly from the "Name and Address Register" menu.

Item	Authority
Add Names	Yes
Add Addresses	Yes
Add Address Components	Yes
Change Addresses that effect other Applications	Yes
Display Usage Enquiry when changing Addresses	No
View Roles for Names	Yes
View Names under Privacy Act	Yes
Display New Component Confirmation Message	Yes
Display Communication details in Applications	No
Duplicate Names Extraction - Clear Possible Duplicates	No
Duplicate Names Extraction - Clear Known Individuals	No

OK Cancel

*System Default Authorities Maintenance Form*

Most of the actions are self explanatory e.g. 'Ability to add Names'.

In Release 3.05 six new security options have been added to control the addition of address components when maintaining addresses accessed from Pathway modules outside of the Name and Address module e.g. Property, Infringements or Rates.

Item	Authority
Add Names	Yes
Add Addresses	Yes
Add ANY Address Component	Yes
Add Address Component 1	No
Add Address Component 2	No
Add Address Component 3	No
Add Address Component 4	No
Add Address Component 5	No
Add Address Component 6	No
Change Addresses that effect other Applications	No
Display Usage Enquiry when changing Addresses	Yes
Display Template Selection for Addresses	Yes

OK Cancel

The Authority setting for these options can be to either 'Yes' or 'No' at the System Default level.

**'Display New Component Confirmation message'** determines whether a message will display to confirm whether a new component is to be created in Name and Address when a new Street, Suburb or Postcode is created in Name and Address. If this action is set to 'No', the new component will be added to Name and Address without asking the user.



**'Display Communication in Applications'** determines whether the default Communication Type will display next to a name when that name is used in other applications, i.e. this authority determines whether Name Communication details will be displayed on an application Name Maintenance form. Release 2.11 of Pathway included functionality that displayed the default contact details for an Identity on an application Name Maintenance form. eg Animal Owner Maintenance. This function has now been included in Name and Address Security, therefore the appropriate security should be set in Name and Address Parameters to enable relevant users to view the information on application Name forms. This change was made to assist councils with issues relating to the Privacy Act.

**'Change Addresses that effect other Applications'** has been introduced at Release 2.15. The default setting for this new Authority parameter is "Yes" as it replicates the functionality available prior to its introduction.

i.e.:

If a user accesses a Mailing Address from the Animals application then they have the authority to modify the address regardless of whether the address is used by any other applications.

If the setting for the "Change Addresses that effect other Applications" Authority parameter is changed to a "No" then users will be prevented from changing a Mailing Address when it effects another application other than the application from which they accessed the Name.

For Example:

If a Mailing Address is accessed from the Animal Maintenance function and the same Mailing Address is also used for Property Ownership correspondence then the user will be prevented from changing the Mailing Address.

Rather than the Address Maintenance screen being displayed the Address Usage Enquiry screen will display.

A status message "You are not Authorised to modify this Address as it is used by other Applications" indicates to the user why the usage enquiry was displayed.

When this situation arises the user should return to the Default Address Maintenance screen and create a new Mailing Address linked directly to their specific Application Role.

This means that correspondence pertaining to their specific Application Role will be sent to one address and all other correspondence pertaining to other Application Roles will continue to be sent to the original addresses.

If the Name requires a "Change of Address" across all applications then this function should be coordinated through a user that is responsible for the administering and maintaining the integrity of the entire Name and Address register.

**'Display Usage Enquiry when changing Addresses'** has been introduced at Release 2.15. The default setting for this new Authority parameter is "No" as it replicates the functionality available prior to its introduction.

i.e.:

If a user accesses a Mailing Address from a given application and they have the authority to maintain the address the Address Maintenance form will be displayed immediately.

If the Mailing Address is used for other purposes a status message indicating "This Address is used for multiple purposes. The Usage Enquiry function indicates the effect of modifying this Address" is also displayed.

If the user fails to detect the status message and modifies the address then they could inadvertently change the location that correspondence is sent for other applications and/or other linkages to their own application.

If the setting for the "Display Usage Enquiry when changing Addresses" Authority parameter is changed to a "Yes" then a user will be presented with the Address Usage Enquiry screen whenever they select an address to modify and the address is used for multiple purposes.

The Address Usage Enquiry details the effect of changing the address but does not prohibit the user from changing the address via the [Modify] button provided.

The objective of this setting is to provide a much more visible impact analysis of the effect of modifying a Mailing Address.

A status message "This Address is used for multiple purposes. The Usage Enquiry indicates the effect of changing the Address via the Modify button." indicates to the user why the usage enquiry was displayed. The [Modify] button still allows the user to modify the address.

**Recommended Settings**

The following settings for the new Name and Address Security Authority parameters are recommended for standard Pathway users.

- 1) "Change Addresses that effect other Applications" should be set to "No".
- 2) "Display Usage Enquiry when changing Addresses" should be set to "Yes".

Note that the settings are the direct opposite of the default settings as the default settings were only chosen to preserve the functionality prior to their introduction.

This recommended combination of settings will:

- 1) Prevent a user modifying a Mailing Address that effects another application.

The user will need to create a new Mailing Address linked directly to their specific Application Role.

- 2) Display the Address Usage Enquiry screen showing the impact of modifying a Mailing Address that is linked to more than one item within their own application.

If selected users require the ability to maintain Mailing Addresses that effect multiple applications then they should use the "Name and Address Register >> Name and Address Parameters >> Name and Address Security" menu option followed by the "Group Authorities" button to override the "Change Addresses that effect other Applications" setting to a "Yes" for the Responsibility Group in which the selected users belong.

**Item**

This field describes the action which is to have specific authority

**Add Authority**

The default authority which will apply to the selected action.

Valid Values are -

- ☐ Yes - the user will be able to perform the specified action
- ☐ No - the user will not be able to perform the specified action

**Responsibility Group Selection Form**

This form is accessed when the Group Single/Multi Role Options button is selected on the Name and Address Security Maintenance Form. It allows the responsibility groups to be enquired on and maintained, and different levels of security to be specified within the responsibility structure.

System Parameter Details	
Description	Group Authorities

Responsibility Structure	
CNA	Name & Address

Responsibility Group	
GENMAN	General Manager
DEPT1	Department Head 1
DEPT2	Department Head 2
DEFAUL	Default User Group

Buttons: Copy, Modify, Close

*Responsibility Group Selection Form*

### Description

This field contains a description of the application options which are being defined. This field is display only and cannot be maintained.

### Responsibility Structure

This field contains the code and description associated with the Responsibility Structure which is being utilised for assigning security. The detail button may be utilised to display this structure, its related groups and users.

### Responsibility Group

This field contains a list of ALL the groups within the selected Responsibility Structure. The following functions may be performed for each group:

- Select the detail button alongside the group to view the user(s) which have been assigned to the group
- Use the Modify button to select the group in order to assign the appropriate parameter, maintenance or authority options
- Use the Copy button to copy the options which have been assigned to other groups. This is intended to assist in the initial set up of the Responsibility Structure assigned options.

### Copy Button

By selecting the Copy button, assigned options may be copied from one Responsibility Group to another. The following steps are required to complete the copy process:

- Highlight the group from which you wish to copy assigned options
- Select the Copy Button to initiate the copy process
- Select the group to which you wish to copy assigned options
- Confirm that you are copying from and to the correct groups

## Group Role Security Maintenance Form

This form displays when Modify is selected. It allows different levels of security to be specified for each group within the responsibility structure.

The security applied here will override any default security for the members of the specified group.

Item	Single Role Authority	Multi Role Authority
Surname	Maintenance	System Default
Given Names	Maintenance	Maintenance
Company Name	Maintenance	Maintenance
Name Type	Maintenance	Maintenance
Title	Maintenance	Maintenance
Sex	Maintenance	Maintenance
Date of Birth	Maintenance	Maintenance
Communication Type	Maintenance	Maintenance
Information Type	Maintenance	Maintenance
Default Address	Maintenance	Maintenance
Application Address	Maintenance	Maintenance
Other Application Address	Maintenance	Maintenance

Group Role Security Maintenance Form

### Structure

The default responsibility structure for which the security defined here will apply.

### Group

The specific group to which the security is being applied.

### Item

The individual component of the name and address record to which the security will apply.

### Single Role Authority

If the name and address record is linked to only one role type then the Authority selected here will apply. Valid values are:

Maintenance
Conditional Maintenance
Enquiry Only
Non-Display
System Default

- ☐ Maintenance - the user will be permitted to modify the selected component.
- ☐ Conditional Maintenance - if the component is blank maintenance will be permitted.
- ☐ Enquiry only - the user will only be able to view the selected component
- ☐ Non-Display - the component will not be displayed.
- ☐ System Default - The value specified in the Default authorities will apply.

### Multi Role Authority

If the selected record has more than one role type link then the authority selected here will apply.

Valid values are:

Maintenance
Conditional Maintenance
Enquiry Only
Non-Display
System Default

- ☐ Maintenance - the user will be permitted to modify the selected component.
- ☐ Conditional Maintenance - if the component is blank maintenance will be permitted.
- ☐ Enquiry only - the user will only be able to view the selected component
- ☐ Non-Display - the component will not be displayed.
- ☐ System Default - The value specified in the Default authorities will apply.

### System Default

The System Default value for the selected component will be displayed here, these fields are non-maintainable.

## Group Authorities Maintenance Form

This form displays when Modify is selected from the Responsibility Group Selection form after Group Authorities is selected in the Name and Address Security Parameters form. It allows security to be placed over specific actions for each group within the responsibility structure.

The security applied here will override any default security for the members of the specified group.

Most of the actions are self explanatory e.g. 'Ability to add Names'.

'Display New Component Confirmation message' determines whether a message will display to confirm whether a new component is to be created in Name and Address when a new Street, Suburb or Postcode is created in Name and Address. If this action is set to 'No', the new component will be added to Name and Address without asking the user.

'Display Communication in Applications' determines whether the default Communication Type will display next to a name when that name is used in other applications, i.e. this authority determines whether Name Communication details will be displayed on an application Name Maintenance form. Release 2.11 of Pathway included functionality that displayed the default contact details for an Identity on an application Name Maintenance form. eg Animal Owner Maintenance. This function has now been included in Name and Address Security, therefore the appropriate security should be set in Name and Address Parameters to enable relevant users to view the information on application Name forms. This change was made to assist councils with issues relating to the Privacy Act.

Responsibility	
Structure	Name & Address
Group	General Manager

Item	Authority
Add Names	Yes
Add Addresses	Yes
Add Address Components	Yes
Change Addresses that effect other Applications	System Default
Display Usage Enquiry when changing Addresses	System Default
View Roles for Names	Yes
View Names under Privacy Act	Yes
Display New Component Confirmation Message	Yes
Display Communication details in Applications	Yes
Duplicate Names Extraction - Clear Possible Duplicates	System Default
Duplicate Names Extraction - Clear Known Individuals	System Default

System Default	
Add Names	Yes

OK Cancel

*Group Authorities Maintenance Form*

At Release 3.05 the 'Add ANY Address' options were introduced. At the Group Authorities level, the Authority setting for each of these new options, along with the 'Add ANY Address Component' option, can be set to either 'Yes', 'No' or 'System Default'.

**Group Authorities Maintenance**

**Responsibility**

Structure: Leons Structure

Group: General Manager

Item	Authority
Add Names	System Default
Add Addresses	System Default
Add ANY Address Component	No
Add Address Component 1	Yes
Add Address Component 2	System Default
Add Address Component 3	System Default
Add Address Component 4	System Default
Add Address Component 5	System Default
Add Address Component 6	System Default
Change Addresses that effect other Applications	Yes
Display Usage Enquiry when changing Addresses	System Default
Display Template Selection for Addresses	System Default

**System Default**

Add Names: Yes

OK Cancel

If the Authority setting of the 'Add ANY Address Component' option is set to 'Yes' directly or via the 'System Default' setting, the users within the relevant Responsibility Group will be able to add new values for ALL address components. This setting will override the setting of all the individual component options.

Security at the individual component level is effected by firstly setting the Authority setting of the 'Add ANY Address Component' option to 'No'. Secondly, where the addition of new component values is to be permitted for a particular component, the Authority setting of the relevant component option should be set to 'Yes' directly or via the 'System Default' setting.

### Structure

The default responsibility structure for which the security defined here will apply.

### Group

The specific group to which the security is being applied.

### Item

This field describes the action which is to have specific authority

### Add Authority

The default authority which will apply to the selected action.

Valid Values are -

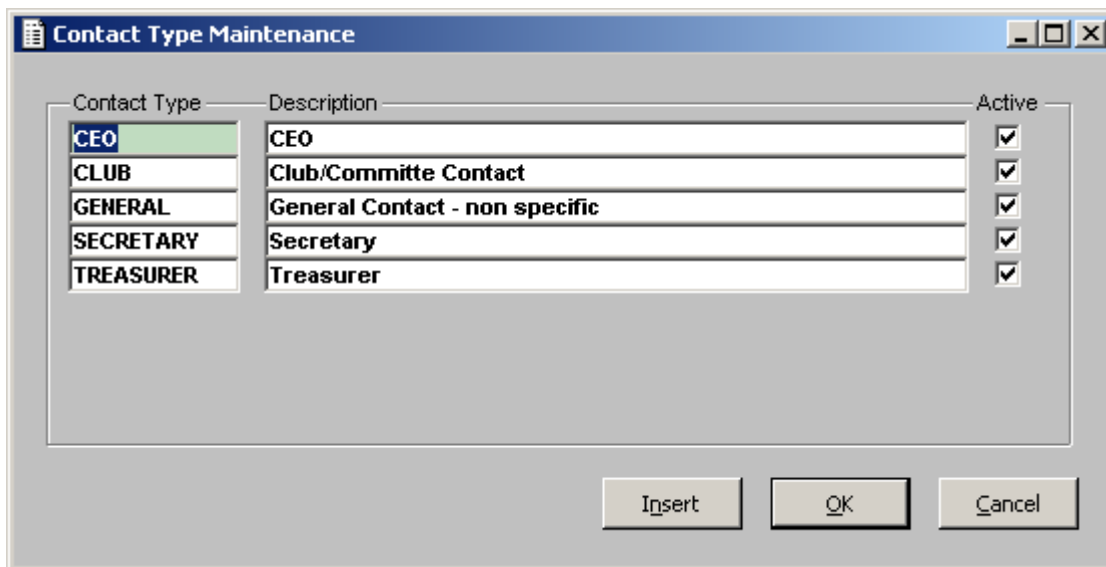
- ☐ Yes - the user will be able to perform the specified action
- ☐ No - the user will not be able to perform the specified action
- ☐ System Default - The value specified in the Default authorities will apply.

### System Default

The System Default value for the selected action will be displayed here, these fields are non-maintainable.

# Contact Type Parameters

## Contact Type Maintenance



The screenshot shows a 'Contact Type Maintenance' window. It contains a table with three columns: 'Contact Type', 'Description', and 'Active'. The 'Contact Type' column has a list box with five items: CEO, CLUB, GENERAL, SECRETARY, and TREASURER. The 'Description' column has corresponding text fields. The 'Active' column has checkboxes, all of which are checked. At the bottom of the window are three buttons: 'Insert', 'OK', and 'Cancel'.

Contact Type	Description	Active
CEO	CEO	<input checked="" type="checkbox"/>
CLUB	Club/Committe Contact	<input checked="" type="checkbox"/>
GENERAL	General Contact - non specific	<input checked="" type="checkbox"/>
SECRETARY	Secretary	<input checked="" type="checkbox"/>
TREASURER	Treasurer	<input checked="" type="checkbox"/>

Buttons: Insert, OK, Cancel

*Contact Type Maintenance Form*

Contacts have been introduced to allow for Contact Names to be stored against a Pathway Name, which can be used to form part of an Address. This was to allow the separation of the Contact name(s) from the Address details to preserve the address record.

### Contact Type and Description

Use the Insert button to create a new Contact Type Record. A 10 character Contact Type Code and a 50 character description of the Contact Type is available.

### Active

The Active Flag will indicate that this Contact Type is available for user within Pathway. The Active flag will default to ON.



# **Name and Address Maintenance**

This chapter deals with the creation and maintenance of Name and Address records which can be utilised by other applications as a Central Name and Address system.

The following topics are covered in this section:

[Creating and Maintaining Name Records](#)

[Name Contacts](#)

[Name Type Conversion](#)

[Role Maintenance/Enquiry](#)

[Creating/Maintaining an Address Record](#)

[Default Address Maintenance](#)

## Creating and Maintaining Name Records

This section deals with the creation and maintenance of Name and Address records via a Central Name and Address option.

### Name and Address Search Profile Form

From this form you may choose to create a New name record or to view and maintain an existing name record. If you select the NEW button you will be presented with a Name and Address maintenance form. (Personal or Company Name Maintenance).

If you enter a Name Search Option (e.g. Surname of 'Smith') and select the Search button, then any name records matching the criteria will be displayed.

If this option is accessed in Enquiry mode, there will be no New button available.

**Name Search Profile**

☒ **Select Using Name Details**

Surname or Company

Given Names

Phonetic ☐ Name Type **Person & Company** ▼

Legal Name

Address Qualifier

Name Category

Name Key

Role Type  >>

Role Status **(All)** ▼

☐ **Select Using Communication Details**

Communication Details  >>

☐ **Select Using Information Details**

Information Details  >>

*Name Search Profile Form*

#### Select Using Name Details

Check this check box on if the Search Profile is to be based on Names detail criteria. The following fields may be used in conjunction with each other if this box is checked on.

Surname or Company

Given Names

Phonetic

Name Type

Address Qualifier

Role Type

Person/Company Name Type (if either Company Name or Personal Name is selected from Name Type)

**Surname or Company**

Enter a Surname or Company Name on which to base your search and use the Search button to initiate the search.

If the Name Type is Person and Company then the field label will be "Surname or Company"

If the Name Type is Personal Name then the field label will be "Surname"

If the Name Type is Company Name then the field label will be "Company Name"

Wild card searching is available on this field.

For example: S\* will retrieve all Names starting with S.  
SEA\* will retrieve all Names starting with SEA.  
\*&\* will retrieve all names that include the '&' character e.g. Maxwell & Sons

**Given Names**

Enter the Given Name on which to base your search and use the Search button to initiate the search. The Given Name may be left blank if unknown. Wild card searching is available. The Given Names option will be dimmed if a Name Type of Company Name is selected.

**Phonetic**

This box should be checked on if phonetic searching is required. A phonetic search is one based on the vocal sound of the word.

For example

The name Furber could be entered as Ferber, Furbur, Ferbur. With the phonetic field checked on the system will return all identities that sound like Furber.

**Name Type**

Select a Name Type, to further qualify a search. The search will return only those name records matching this Name Type. Three options are available from the drop down list.

1. Personal Name
2. Company Name
3. Person and Company

If Personal Name is selected then only those name records that are of a type "Person" will be retrieved.

If Company Name is selected then only those name records that are of a type "Company" will be retrieved.

If Person and Company is selected then both Name Types are retrieved.

**Address Qualifier**

Enter an address qualifier to further qualify a search. Any component of the address may be used within the qualifier e.g. Identifier, Street name, Suburb name or Postcode may be entered. Use of the \* placed as the first character of this field will ensure accurate search results.

Matching on the Address Components is case sensitive. The Address Qualifier can only be used when a Name Search Option has been entered.(i.e. Surname or Company Name).



Whilst your search profile should contain a Name, if you wish to use a Qualifier (e.g. an address) without nominating a Name Profile then an asterisk (\*) may be entered in the Surname/Company Name field. Searching by this method, however, may be very slow.

**Person/Company Name Category**

This field allows a valid Person Name Category or Company Name Category to be entered or selected from the pop up form. If the Name Type is set to Person, the selection is restricted to Person Category entries. If the Name Type is set to Company the selection is restricted to Company Category entries. It is possible to search by Company Name and Company Category when performing "company only" name searches. If the Name Type is set to Person and Company, this field is dimmed and is not maintainable.

**Name Key**

The Name Key field is available when the Name and Address Search Profile form is called directly from the Name and Address Maintenance or Name Enquiry menu options and additionally when it is called from any other application.

It allows a unique Name Key (TPKCNAIDTY value) to be keyed in as a search profile. This field has been provided to assist with locating names based on unique Name Key values held within external Document Management systems.

**Note:** The 'Name Key' search field is mutually exclusive to all other Name search profile fields, i.e. if the TPKCNAIDTY value is provided then all other Name search fields will be dimmed.

### **Role Type**

Enter a valid Role Type or select one from the pop up form. The retrieve profile will only return those Names with a matching Role Type.

For example: LPA 0 will select only the Property Owners.

Application based searching is also available by entering the Application code with no Role Number.  
For example : LAP will select all Application related Names.

### **Name Role Type Pop Up**

This pop up button can be used to present a Name Role Type Pop up form so that a selection can be made.

### **Role Status**

The "Role Status" field enables name searches by Role Type to be qualified by "Current" and/or "Historic" role linkages.

### **Select using Communication Details**

Check this box on if the Search Profile is to be based on Communication Detail criteria.

### **Communication Details**

This field provides the ability to search via communicate type. This allows names to be retrieved based upon any of the user-defined communication types. If this search mechanism is selected it is not possible to search by a company name or an information type.

Enter valid communication details (e.g. telephone/fax number) on which to base a search, or select details from the Communication Details pop up form.

### **Select using Information Details**

Check this box on if the Search Profile is to be based on Information Detail criteria.

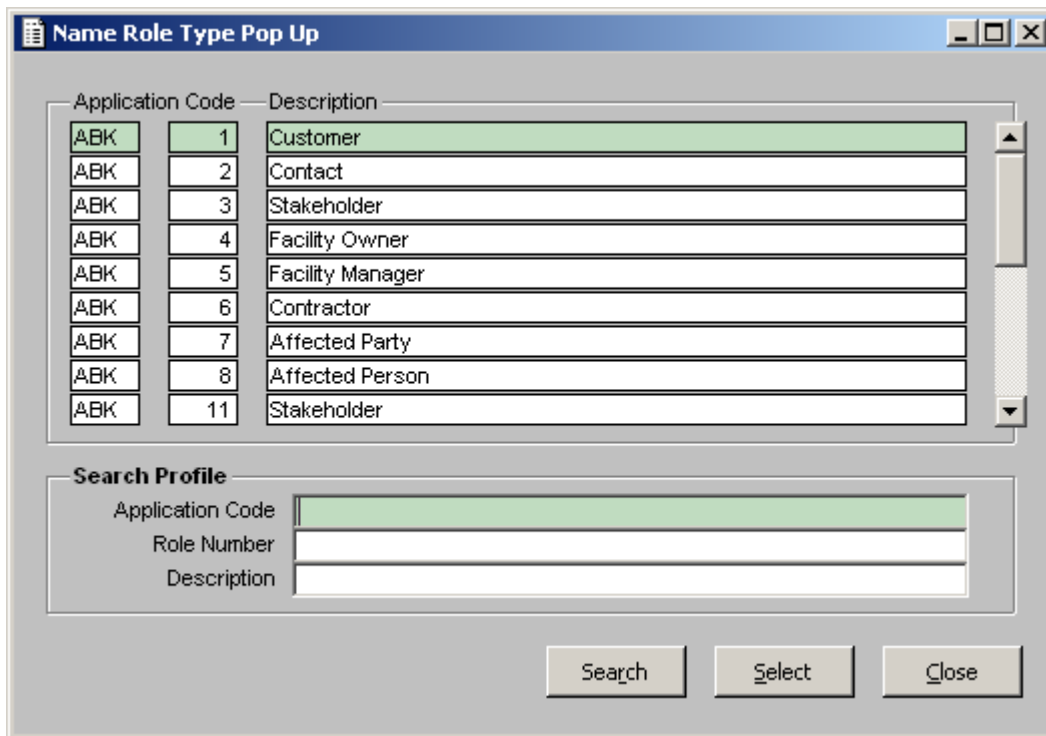
### **Information Details**

This field provides the ability to search via information type. This allows names to be retrieved based upon any of the user-defined information types. If this search mechanism is selected it is not possible to search by a company name or a communication type.

Enter valid Information details (e.g. Company/Employer number) on which to base a search, or select details from the Information Details pop up form.

## **Name Role Type Pop Up Form**

This form enables a particular Role Type to be selected to tailor the Name and Address search performed.



The screenshot shows a 'Name Role Type Pop Up' window. It contains a table with columns 'Application Code', 'Role Number', and 'Description'. The table lists various roles like Customer, Contact, Stakeholder, Facility Owner, Facility Manager, Contractor, Affected Party, Affected Person, and Stakeholder. Below the table is a 'Search Profile' section with three input fields: 'Application Code', 'Role Number', and 'Description'. At the bottom are three buttons: 'Search', 'Select', and 'Close'.

Application Code	Role Number	Description
ABK	1	Customer
ABK	2	Contact
ABK	3	Stakeholder
ABK	4	Facility Owner
ABK	5	Facility Manager
ABK	6	Contractor
ABK	7	Affected Party
ABK	8	Affected Person
ABK	11	Stakeholder

**Search Profile**

Application Code

Role Number

Description

Search Select Close

Name Role Type Pop Up Form

### Application Code

This field contains a list of Application Codes. The first 3 characters indicate the Application (i.e. LAP - Property) and then a unique number is allocated to identify the Role Type (i.e. 0 - Owner, 1 - Occupier etc). The Application Codes are system defined codes which cannot be amended.

### Description

This field contains a Description for each of the Application Codes in the list. The Description further describes the Role Types.

### Search Profile - Application Code

This field can be used to search on a particular Application Code. Enter an Application Code on which to base your search and select the Search button. Wildcard searching is available. For example : L\* will select all Application Codes starting with L.

### Search Profile - Role Number

This field can be used to select a particular Role Number, in conjunction with or separate from the other Retrieve Profile fields. Enter a Role Number on which to base your search and select the Search button. For example : A Role Type of 1 will select any Application with a Role Type number 1

### Search Profile - Description

This field can be used to search on a particular Description. Enter a Description on which to base your search and select the Search button. Wild card searching is available. For example : P\* will select all Descriptions starting with P.

## Communication Details Pop Up

This form allows searching and selection of Personal and Company Name Communication Details. The search profile will default to (none) when the form is accessed. A Communication Type may be selected within the Personal Name or Company Name Search Profile and the Search button selected to initiate the search. Lengthy wait times may be experienced in some situations.

If a Role Type has been specified in the Applications or Property Search Profile forms, then the details retrieved on this form should match the specified Role Type, e.g. If a search within Applications filters by the Role Type of Builder, then the Communication Details (e.g. Phone numbers) retrieved should only apply to Builders.

Personal Name Communication Details		
com 1	(051) 236 6541	Mr Brenton Stanley John W - 1 Georgian Ave, ADELAIDE SA 5000
	(08) 255 85567	Mr Wallace Gromit - 25 Martins Drv, ADELAIDE SA 5000
	(08) 255 85567	Mrs Mary Gromit - 25 Martins Drv, ADELAIDE SA 5000
	(08) 3663 65955	Mr Horace Hippo - Zoo Gardens, Gameau Cl, ADELAIDE SA 5000
Business Phone	(08) 5432 1234	Miss Tamara George - 11 Section St, DAVV PARK SA 5042
Alternate Phone	(08) 555 6666	Mr Adam Ant - 23 Ingelby Rd, VVARVMCK QLD 2000
com 1	(08) 653 9563	Miss Susan Furber - C/O - 208 Greenhill Rd, EASTWOOD SA 5063

Company Name Communication Details		
After Hours Number	(08) 8345 6789	MICROWISE - 56 Bridge St, KENSINGTON SA 5068
Contact Phone	(08) 83726111	GEAC - Crowded House, 500 Smith Ave, ADELAIDE SA 5000
Name Type Transfer	01010111=Alternate Phone Number	POTUS - 77 Acacia St, ABERFOYLE PARK SA 5159
Business Phone	02020222	POTUS - 77 Acacia St, ABERFOYLE PARK SA 5159
Fax Number	03030333	POTUS - 77 Acacia St, ABERFOYLE PARK SA 5159
Name Type Transfer	04040444=Home Phone Number	POTUS - 77 Acacia St, ABERFOYLE PARK SA 5159
After Hours Number	0412 950039	CARLISLE ENTERPRISES PTY. - 665 Mellor Ln, KATOOMBA NSW 2150

Personal Name Communication Search Profile		Company Name Communication Search Profile	
Communication Type	(All)	Communication Type	(All)
Communication Details		Communication Details	

Communication Details Pop Up Form

### Personal Name Communication Details

These fields contain personal Communication Details which can be selected and used for searching.

### Company Name Communication Details

These fields contain company Communication Details which can be selected and used for searching.

### Personal Name Communication Search Profile - Communication Type

This field allows selection via a drop down list of Detail Types on which to search. These Detail Types are user defined and can be set up in Parameters.

### Personal Name Communication Search Profile - Communication Details

This field is used to enter Communication Details on which to base your search. Wild card searching is available.

### Company Name Communication Search Profile - Communication Type

This field allows selection via a drop down list of Detail Types on which to search. These Detail Types are user defined and can be set up in Parameters.

### Company Name Communication Search Profile - Communication Details

This field is used to enter Communication Details on which to base your search. Wild card searching is available.

## Information Details Pop Up

This form allows searching and selection of Personal and Company Name Information details.

The search profile will default to (none) when the form is accessed. An Information Type may be selected within the Personal Name or Company Name Search Profile and the Search button selected to initiate the search. Lengthy wait times may be experienced in some situations.

If a Role Type has been specified in the Applications or Property Search Profile forms, then the details retrieved on this form should match the specified Role Type, e.g. If a search within Applications filters by the Role Type of Builder, then the Information Details (e.g. Phone numbers) retrieved should only apply to Builders.

**Information Details Pop Up**

**Personal Name Information Details**

Employee Number	007	Mr James Bond - 1 Goldeneye Ave, GREENWICH SA 5099
Surveyor's Registrat.	01010101	Sole Brothers Discount St - 35 George St, NORWOOD SA 5067
Employee Number	100	Mr Frank Louis Farmer - 27 George St, NORWOOD SA 5067
	1210	Miss Susan Furber - C/O - 208 Greenhill Rd, EASTWOOD SA 5063
Name Type Transfer	12345=Employee Number	Lord Hugh Grant - The Mansion, 57 Bridge St, KENSINGTON SA 5068
Drivers License	1234567	Mr Fred Francis Ace - Unit 2/ 35 Cameron Rd, ALDINGA BEACH SA 5173
Builder's Licence No	12345678912345678912345678912	Sole Brothers Discount St - 35 George St, NORWOOD SA 5067

**Company Name Information Details**

Australian Company	1238995677	THIS IS A COMPANY PTY LTD - 466 Albert St, PROSPECT SA 5082
LSL Agency Code	003	GEAC - Crowded House, 500 Smith Ave, ADELAIDE SA 5000
Australian Company	100098765	MICROWISE - 56 Bridge St, KENSINGTON SA 5068
Surveyor's Registrat.	1122334455	STEEL FRAME HOMES PTY LTD - 125 Wingfield Rd, WINGFIELD SA 5013
	1239879899	A V JENNINGS & BROTHERS - 19a North Tce, ADELAIDE SA 5000
Builder's Licence No	234569999	ELDERS REAL ESTATE - 76 Grenfell Al, ADELAIDE SA 5000
ABN	3222 11225	GEAC - Crowded House, 500 Smith Ave, ADELAIDE SA 5000

**Personal Name Information Search Profile**

Information Type: (All)

Information Details:

**Company Name Information Search Profile**

Information Type: (All)

Information Details:

Search Select Close

Information Details Pop Up Form

### Personal Name Information Details

These fields contain personal details e.g. drivers license, employee number etc which can be selected and used for searching. These Detail Types are user-defined and can be set up in Parameters.

### Company Name Information Details

These fields contain company details e.g. company number, council areas etc which can be selected and used for searching. These Detail Types are user-defined and can be set up in Parameters.

### Personal Name Information Search Profile - Information Type

This field allows selection via a drop down list of Detail Types on which to search. Sample Information Types could be:

- Council Areas
- Drivers License
- Employee Number
- (All)
- (none)

The default is (All).

### Personal Name Information Search Profile - Information Details

This field is used to enter Information Details on which to base your search. Wild card searching is available.

### Company Name Information Search Profile - Information Type



This field allows selection via a drop down list of Detail Types on which to search. Sample Information Types could be:

- Australian Company Number
- Council Areas
- Line of Business
- Test Type
- (All)
- (None)

The default is (All).

### Company Name Information Search Profile - Information Details

This field is used to enter Information Details on which to base your search. Wild card searching is available.

## Name Selection Form

This form presents a list of all names matching the retrieve profile. New name records may be created from this form or modification of an existing one.

If this option is accessed in Enquiry mode, there will be no NEW button available.

Name	Address	Active
Green, Benjamin (Private)	56 Victoria St, BLACKFOREST SA 5035	<input checked="" type="checkbox"/>
Green, Fred (Private)	4/44 Separation Ave, BLACKFOREST SA 5035	<input checked="" type="checkbox"/>
Green, Harold (Private)	56 East Tce, BLACKFOREST SA 5035	<input checked="" type="checkbox"/>
Green, Harry	Po BOX 23, KENSINGTON SA 5068	<input checked="" type="checkbox"/>
Green, Henry	78 Green Ave, KENSINGTON SA 5068	<input checked="" type="checkbox"/>
Green, Jack (Deceased) (Private)	45 East Tce, BLACKFOREST SA 5035	<input checked="" type="checkbox"/>
Green, Jo	1 Georgian Ave, ADELAIDE SA 5000	<input checked="" type="checkbox"/>
Green, Justine	45 East Tce, BLACKFOREST SA 5035	<input checked="" type="checkbox"/>
Green, Kevin	59a Gameau Cl, ADELAIDE SA 5000	<input checked="" type="checkbox"/>

**Name Details**

Communication Details

E-Mail Address: BEN.GREEN@HOTMAIL

Information Details

Drivers License: F5555555

Application Information Details

Application Mailing Address Details

Document Copy New Modify Close

Name Selection form

### Name

This field contains a list of all names matching the Retrieve Profile entered on the previous form. The Names are displayed in alphabetical order. Select a Name and click on the Modify button to amend the details as required.

### Address

This field contains a list of all corresponding addresses for the listed names. Addresses are formatted according to parameter rules.

### Name Details

This field contains a view of the details available for the name highlighted on the selection form.

When selecting a name based upon its association to another entity (i.e. based on roles) then the role information will be displayed in the summary before the communication and information types to allow the user to easily identify the roles associated with the displayed name without having to scroll through the summary.

Double click on the field to "Zoom" to full view or use the scroll bar to scroll up and down the field.

When the entry cursor is placed in the Names Details summary box the system retrieves the first 50 role linkages for the name. If the name has less than 50 role linkages then the Name Details summary box information is completed and presented to the user.

If the name has more than 50 role linkages then a message is presented to the user for every 50 role linkages that are retrieved to construct the Name Details summary information.

i.e.:

*Constructing Name Details summary information. Retrieved lines of Application Information details. Continue retrieving Application Information detail lines, or Truncate the Name Details summary information? [Continue] [Truncate]*

This allows the user to "Truncate" the Name Details summary information at any time during its construction thus avoiding excessive response times.

If a user chooses to truncate the Name Details summary information then a special suffix is appended to the bottom of the information already constructed to indicate that the summary details are not complete.

When a user needs to view all role linkages for a name then the [Roles] button from the Name Maintenance/Enquiry form provides this facility.

### **Application Mailing Address Details**

This box displays any overriding mailing addresses which apply to any application Role Types for the name selected. The format will display as per the following:

Applicant: 201 Greenhill Road EASTWOOD SA 5063  
Ratepayer: 44 Glen Osmond Road EASTWOOD SA 5063

Only 'Current' Role and Address links will display (i.e. Not Historic)

If 'Ability to view Names under Privacy Act' has been turned OFF in Name and Address security, then these details will not display for names which have been flagged as 'Private'. A message: 'NOT AUTHORISED TO THIS INFORMATION' will display instead.

If 'Other Application Address' has been set to NON-DISPLAY in Name and Address Security, then these details will not display from other applications.

### **Document Button**

By pressing this button, generation and printing of Name and Address Labels or Letters for the Names listed on the Name Selection screen is available.

A list of available Merge Types is displayed for selection. These Merge types may indicate different Labels formats.

### **Copy Button**

This button allows a copy to be made of the Name record. Not all details are copied, however. Only the Surname, Communication and Information details are copied to the new record.

If the record is not required and the Cancel button is selected, the new record is still created. To delete the new record before any roles are attached to it, the record should be maintained using the Modify button or by double clicking on the record and then deleted using the F11 key.

## **Personal Name Maintenance Form**

This form will allow you to enter and maintain Personal Name, Communication and Information details. This form is presented if the Personal Name type is selected.

### Inserting Communication and Information Types


Addition of Communication and Information Types is controlled by the positioning of the cursor. If the cursor is positioned within the Communication Type details, the Insert function will assume that a new

Communication Type is to be added. If positioned within Information Type details, the Insert function will assume that a new Information Type is to be added.

If the cursor is positioned in neither of these areas, the choice is available, to add either Communication or Information Type details.

If Personal Name Maintenance is accessed in Enquiry mode, the Insert button will be dimmed and unavailable for selection.

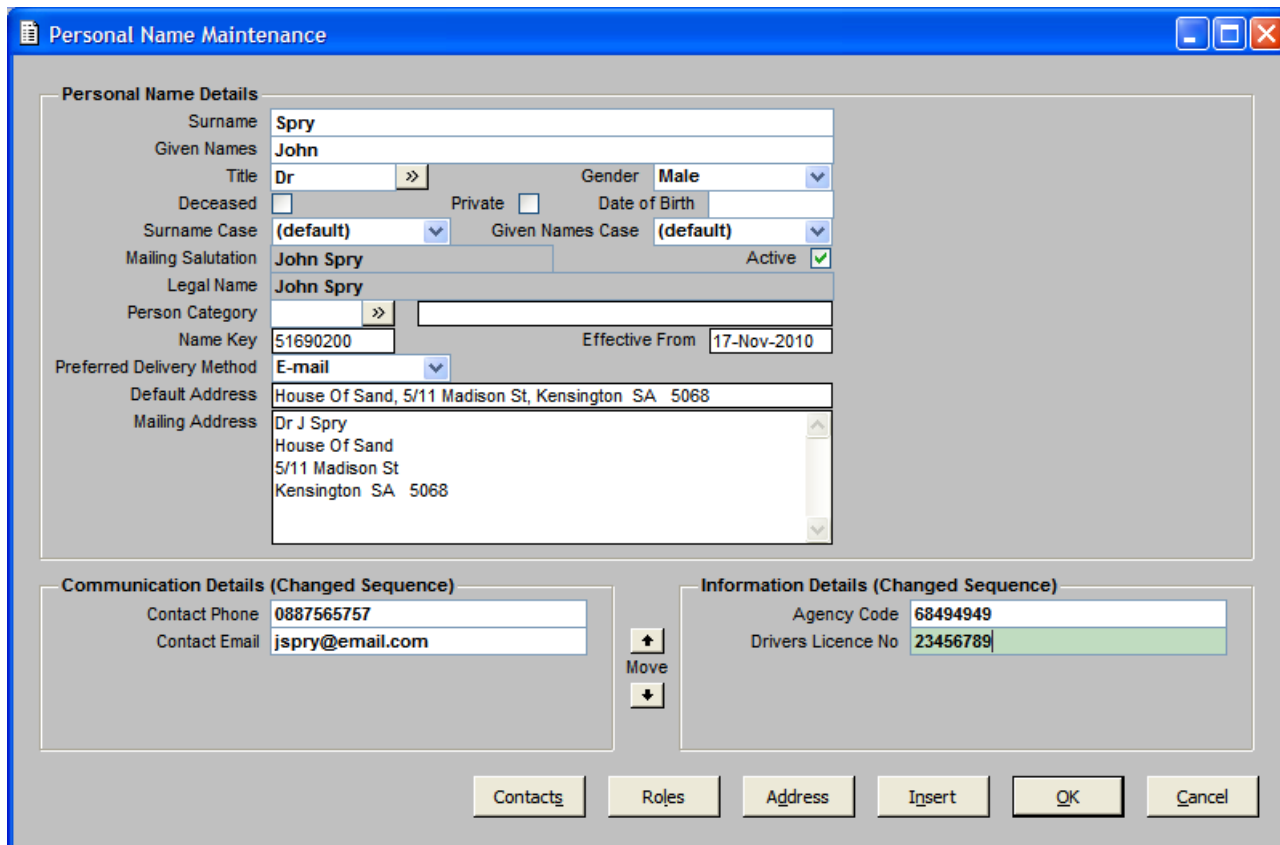
The frame labels will indicate if the sequence is the default sequence or whether the sequence has been changed. Menu options are available from the Edit menu to restore the default sequence if required.

: The Formatted Name Field, which is made up of the Surname, Given Names and Title, only allows a maximum of 50 characters. If the formatted Name exceeds 50 characters, and the Roles Button is selected, then a message will display at the bottom of the form: "Formatted Name length Excessive – Alternative Formatting Applied". The Formatted Name which displays in the subsequent Application Role Maintenance Form will have various formatting options applied to it based on the logical formatting hierarchy.

Note: When the New button is invoked from the Name Search Profile form and values are present for Surname, Given Names and Name Category, these values are carried forward to the new record created in the Name Maintenance form. The example above shows the outcome for a Personal Name in the Thick Client. A similar outcome occurs for a Company Name in the Thick Client and the same functionality for both name types is included in the Smart Client.

The carrying-forward of values is performed on the assumption that they have been used in an unsuccessful search for a corresponding Name record and the intention is to add the new record. If wildcard characters are present in a Name value, that value will not be carried forward to the Name Maintenance form.

This behaviour also applies if the New Button is used from the Name Selection form, when the search has resulted in no occurrences. If the Person Category or Company Category was set on the Name Search Profile it will carry forward to the Names Maintenance form only if the Name Type is not changed in the Name Search options on the Names Selection form.



**Personal Name Maintenance**

**Personal Name Details**

Surname: Spry  
 Given Names: John  
 Title: Dr >> Gender: Male  
 Deceased: ☐ Private: ☐ Date of Birth:   
 Surname Case: (default) Given Names Case: (default)  
 Mailing Salutation: John Spry Active: ☒  
 Legal Name: John Spry  
 Person Category: >>   
 Name Key: 51690200 Effective From: 17-Nov-2010  
 Preferred Delivery Method: E-mail  
 Default Address: House Of Sand, 5/11 Madison St, Kensington SA 5068  
 Mailing Address: Dr J Spry  
 House Of Sand  
 5/11 Madison St  
 Kensington SA 5068

**Communication Details (Changed Sequence)**

Contact Phone: 0887565757  
 Contact Email: jspry@email.com

**Information Details (Changed Sequence)**

Agency Code: 68494949  
 Drivers Licence No: 23456789

Move: ↑ ↓

Contacts Roles Address Insert OK Cancel

Personal Name Maintenance Form

**Surname**

This field contains the Surname of the name record currently being maintained. If a new Surname is being entered then case conversion rules (set at the parameter level) are applied. If a Surname is modified then the case conversion rules will also be applied. In some circumstances the default case conversion applied to a name is not appropriate and therefore the ability to override the case conversion rule for a Surname has been provided. The Surname Case field (as detailed below) enables the case conversion rule for a specific surname to be overridden.

Assuming that the Surname Case Conversion setting within the Name and Address System Parameter is set to "Capitalize" then all Personal Surnames would be capitalized by default.

The following Surnames would need their specific "Surname Case" modified to "No Conversion" and the Surname manually modified.

"Deangelis" could be changed to "DeAngelis"

"MacRo" could be changed to "Macro"

"Van De Kamp" could be changed to "van de Kamp"

"Oneill" could be changed to "ONeill"

The "Capitalize" case conversion process has been changed for names that contain an apostrophe followed by an S and names that contain a special character as the first letter of a word.

Prior to this change the following case conversion would have been performed:

1) A surname of "o'shea" would have been correctly converted to "O'Shea".

2) A company name of "jim's mowing" would have been incorrectly converted to "Jim'S Mowing".

The corrected case conversion is "Jim's Mowing".

3) A company name of "esprit (retail) Pty Ltd" would have been incorrectly converted to "Esprit (retail) Pty Ltd".

The corrected case conversion is "Esprit (Retail) Pty Ltd".

4) A company name of "o'shea's irish pub (dublin)" would have been incorrectly converted to "O'Shea'S Irish Pub (dublin)".

The corrected case conversion is "O'Shea's Irish Pub (Dublin)".

**Given Names**

This field contains the given names of the name record currently being maintained. If a new Given Name is modified then the case conversion rules will also be applied. In some circumstances the default case conversion applied to a name is not appropriate and therefore the ability to override the case conversion rule for a Given Name has been provided. The Given Names Case field (as detailed below) enables the case conversion rule for a specific Given Name to be overridden.

Assuming that the Given Names Case Conversion setting within the Name and Address System Parameter is set to "Capitalize" then all Personal Given Names would be capitalized by default.

The following Given Name would need its specific "Given Names Case" modified to "No Conversion" and the Given Name manually modified.

"Mack" could be changed to "Mack"

**Title**

This field contains a valid title for this name record. Enter a valid name title or click on the pop up button to select a valid name title from the list.

**Gender**

This field contains the Gender type for this name record. Three options are available from the drop down list

4. Male
5. Female
6. Unknown

**Deceased**


This box should be checked on if the person is deceased. A Confirmation message will display whenever this indicator is modified. Clicking Yes will modify the flag. Clicking No will leave it unchanged.

**Private**

This box should be checked on if the name record is to remain private.

**Date of Birth**

This field contains the person's Date of Birth (if known). The Date of Birth will be formatted to the standard date format.

 To enter a Date of 29th September 1971, the following formats could be used - 290971, 29091971, 29 Sept 71. These formats would all be converted to the standard date format. Any invalid dates will be highlighted.

### Mailing Salutation

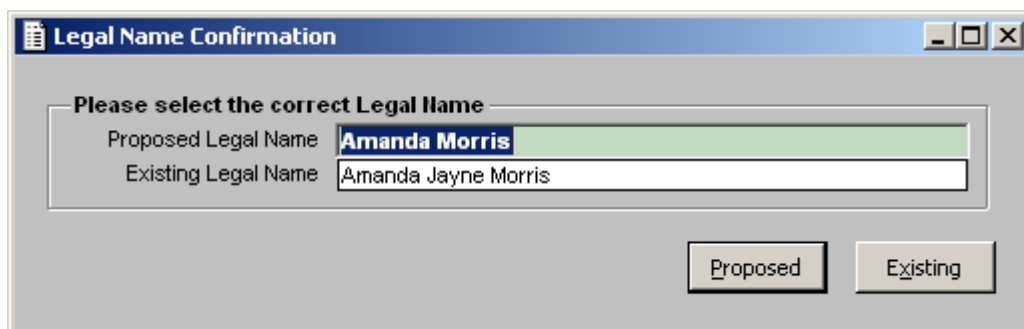
This field contains details of the salutation to be used in letter merges.

### Legal Name

Legal Name which may be 250 characters long to enable recording of an entire Legal Name for Names that are too long to fit in the standard Person or Company Name fields that are designed for mailing purposes.

The Legal Name defaults from the data in the name fields unless overridden. The Name Search profile form now allows searching by this Legal Name field which provides the ability to search over the entire name that was not previously possible. You must either search by Legal Name or by the other name detail fields. This Search profile enforces this by not allowing entry of combinations of these fields.

When the name details change, the default Legal Name is updated automatically on the screen and at the completion of the name change if the Legal Name has not been modified manually a prompt to confirm the change to the Legal Name is displayed. This allows you to retain the existing Legal Name or update the Legal Name to the 'proposed' new Legal Name (based on the new name details).

A screenshot of a 'Legal Name Confirmation' dialog box. The title bar says 'Legal Name Confirmation'. Inside, it says 'Please select the correct Legal Name'. There are two text boxes: 'Proposed Legal Name' containing 'Amanda Morris' and 'Existing Legal Name' containing 'Amanda Jayne Morris'. At the bottom, there are two buttons: 'Proposed' and 'Existing'.

*Legal Name Confirmation Form*

The Legal Name search capability is available through the Name and Address module and also via all other Pathway modules that make use of Name and Address.

### Active

If this box is checked on then the name record is available to the system.

If this box is checked off then the name record is no longer available to the system. Any other record using this name record will remain as entered. The name will no longer be available for linking to any other application.

### Surname Case

This field enables the case conversion rule for a specific Surname to be overridden. The initial value of this field is (default) and therefore the Case Conversion Rules defined in the Name and Address System Parameters are applied to the name elements unless the conversion rule is specifically overridden on the name.

The options available from the dropdown are:

- All Upper Case
- Capitalize
- No Conversion
- (default)

See further details under Surname (69).

### Given Names Case

This field enables the case conversion rule for a specific Given Name to be overridden. The initial value of this field is (default) and therefore the Case Conversion Rules defined in the Name and Address System Parameters are applied to the name elements unless the conversion rule is specifically overridden on the name.

The options available from the dropdown are:

- All Upper Case
- Capitalize
- No Conversion
- (default)

See further details under Given Names (69).

### Person Category

This field allows selection of a Person Category and description from a pop up list. The Person Category details are used to further identify a name.

### Name Key

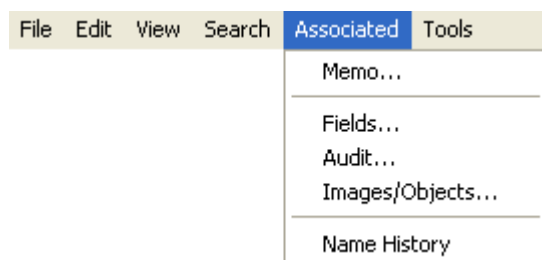
The Name Key field displays the TPK value of the name record. . This field has been provided to assist with locating names based on unique Name Key values held within external Document Management systems.

### Effective From

The Effective From field on the Person Name Maintenance form will contain the date the Name details were changed to those currently displayed. If there has been no change to the Name details since the Name was created, the Effective From field will contain the current system date.

Please Note: As at Rel 2.18, all Names will display the current system date, until such times as a change is made.

A new menu option has been added to both forms under the Associated menu on the menu bar called Name History.



When activated the Name History menu option will display the Name History Enquiry form which shows the details that are captured when the Name is changed.

### Preferred Delivery Method

The *Preferred Delivery Method* drop-down field has three possible values, *Post* (the default), *E-mail* and *Fax*. If *Post* is selected for a particular name, Word Processing documents will by default be printed, and will need to be physically sent to the recipient. If *E-mail* or *Fax* is selected, Word Processing documents will be converted to PDF files and sent to the recipient electronically. A warning message will be displayed if *Fax* is selected when no fax details have been specified in Mail and Fax Server Maintenance.

### Default Address

This field contains the Formatted Address, which shows the current Default Address for the nominated Name. No modification or deletion of this field is allowed.

### Mailing Address

The Mailing Address field displays the details as they will be extracted into documents. This field is constructed on the fly as details are added to the record.

### Communication Details

This field contains communication details for the name record currently being maintained. To create a new communication record click on the Insert button at the bottom of the form. An unlimited number of communication details may be added to the name record.

The same communication detail may be added more than once to a single name record. e.g. Home Phone number could be added twice.

If the Communication Details have not been defined in the Parameter option, there will be no option to add them via Maintenance.

Note: Communication and Information Details panels have been moved so they are side-by-side to accommodate the new Mailing Address field. As such, both panels now share the Up/Down Move buttons used to resequence entries within each panel. The Up/Down buttons will now take effect upon the row in the panel which has focus.

### Information Details

This field contains information details for the name record currently being maintained. To create a new information detail click on the Insert button at the bottom of the form. An unlimited number of information details may be added to the name record.

The same information detail may be added more than once to a single name record. e.g. Employee ID could be added twice.

If the Information Details have not been defined in the Parameter option, there will be no option to add them via Maintenance.

Note: Communication and Information Details panels have been moved so they are side-by-side to accommodate the new Mailing Address field. As such, both panels now share the Up/Down Move buttons used to resequence entries within each panel. The Up/Down buttons will now take effect upon the row in the panel which has focus.

### Roles Button (Personal Name)

By pressing the Roles button, existing Role Records can be viewed. Roles are the links to other system applications for the selected name

For example

A name may have Roles of Property Owner, Applicant etc.

A name may also be related to another name e.g. Company A may be the parent company to Companies B and C. Similarly, Companies B and C have child relationships with Company A.

If no application roles exist then a message will be displayed.

### Address Button (Personal Name)

By pressing the Address button, the default address details for the current name may be maintained.

Existing application address details can be viewed.

At least one Default Address must exist for each Personal Name.

## Name Title Pop Up Form

*Name Title Pop Up Form*

### **Title**

The Title field details all options available for selection

### **Search Profile**

The Search Profile allows entry of a specific title criteria. After entry in this field, click on the Search button to being the search.

## **Company Name Maintenance Form**

This form will allow you to enter and maintain Company Name, Communication and Information details. This form is presented if Company Name type is selected.

### Inserting Communication and Information Types

Addition of Communication and Information Types is controlled by the positioning of the cursor. If the cursor is positioned within the Communication Type details, the Insert function will assume that a new Communication Type is to be added. If positioned within Information Type details, the Insert function will assume that a new Information Type is to be added.

If the cursor is positioned in neither of these areas, the choice is available, to add either Communication or Information Type details.

If Personal Name Maintenance is accessed in Enquiry mode, the Insert button will be dimmed and unavailable for selection.

The frame labels will indicate if the sequence is the default sequence or whether the sequence has been changed. Menu options are available from the Edit menu to restore the default sequence if required.

**Note:** When the New button is invoked from the Name Search Profile form and values are present for Surname, Given Names and Name Category, these values are carried forward to the new record created in the Name Maintenance form. The example above shows the outcome for a Personal Name in the Thick Client. A similar outcome occurs for a Company Name in the Thick Client and the same functionality for both name types is included in the Smart Client.

The carrying-forward of values is performed on the assumption that they have been used in an unsuccessful search for a corresponding Name record and the intention is to add the new record. If wildcard characters are present in a Name value, that value will not be carried forward to the Name Maintenance form.

This behaviour also applies if the New Button is used from the Name Selection form, when the search has resulted in no occurrences. If the Person Category or Company Category was set on the Name Search



Profile it will carry forward to the Names Maintenance form only if the Name Type is not changed in the Name Search options on the Names Selection form.

Company Name Maintenance form

### Company Name

This field contains the Company Name of the name record currently being maintained. If a new Company Name is being entered then case conversion rules (set at the parameter level) are applied. If a Company Name is modified then the case conversion rules will also be applied. In some circumstances the default case conversion applied to a name is not appropriate and therefore the ability to override the case conversion rule for a Company Name has been provided. The Company Name Case field (as detailed below) enables the case conversion rule for a specific company name to be overridden.

Assuming that the Company Name Case Conversion setting within the Name and Address System Parameter is set to "Capitalize" then all Company Names would be capitalized by default.

The following Company Names would need their specific "Company Name Case" modified to "No Conversion" and the Company Name manually modified.

"Ami Insurance" could be changed to "AMI Insurance"

"Abc Radio" could be changed to "ABC Radio"

"MacKay City Council" could be changed to "Mackay City Council"

"International Business MacHines" could be changed to "International Business Machines"

### Government Identity

This box should be checked on if the Company Name being entered is for a Government Agency. This field is used by other applications.

### Mailing Salutation

This field contains details of the salutation to be used in letter merges.

### Active

If this box is checked on, the name record is available to the system.

If this box is checked off, the name record is no longer available to the system. Any other record using this name record will remain as entered. The name will no longer be available for linking to other Applications. This box will default as Active when a new name is added.

### Legal Name

Legal Name which may be 250 characters long to enable recording of an entire Legal Name for Names that are too long to fit in the standard Person or Company Name fields that are designed for mailing purposes.

The Legal Name defaults from the data in the name fields unless overridden. The Name Search profile form now allows searching by this Legal Name field which provides the ability to search over the entire name that was not previously possible. You must either search by Legal Name or by the other name detail fields. This Search profile enforces this by not allowing entry of combinations of these fields.

When the name details change, the default Legal Name is updated automatically on the screen and at the completion of the name change if the Legal Name has not been modified manually a prompt to confirm the change to the Legal Name is displayed. This allows you to retain the existing Legal Name or update the Legal Name to the 'proposed' new Legal Name (based on the new name details).

The screenshot shows a window titled "Legal Name Confirmation". Inside, there is a prompt "Please select the correct Legal Name". Below this, there are two text input fields. The first is labeled "Proposed Legal Name" and contains the text "GEAC COMPUTERS PTY LTD.". The second is labeled "Existing Legal Name" and contains the text "GEAC COMPUTERS PTY LTD". At the bottom right of the form, there are two buttons: "Proposed" and "Existing".

*Legal Name Confirmation Form*

The Legal Name search capability is available through the Name and Address module and also via all other Pathway modules that make use of Name and Address.

### Company Category

This field allows selection of Company Category from the pop up list. The Company Category is used to further identify a name.

### Name Key

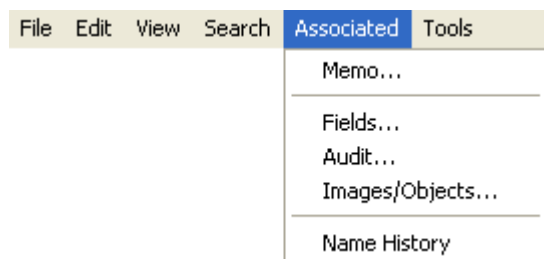
The Name Key field displays the TPK value of the name record. This field has been provided to assist with locating names based on unique Name Key values held within external Document Management systems.

### Effective From

The Effective From field on the Company Name Maintenance form will contain the date the Name details were changed to those currently displayed. If there has been no change to the Name details since the Name was created, the Effective From field will contain the current system date.

Please Note: As at Rel 2.18, all Names will display the current system date, until such times as a change is made.

A new menu option has been added to both forms under the Associated menu on the menu bar called Name History.



When activated the Name History menu option will display the Name History Enquiry form which shows the details that are captured when the Name is changed.

### Default Address

This field displays the default Address details for the Company. The field is not maintainable.

**Company Name Case**

This field enables the case conversion rule for a specific Company Name to be overridden. The initial value of this field is (default) and therefore the Case Conversion Rules defined in the Name and Address System Parameters are applied to the name elements unless the conversion rule is specifically overridden on the name.

The options available from the dropdown are:

- All Upper Case
- Capitalize
- No Conversion
- (default)

See further details under Company Name (74)

**Mailing Address**

The Mailing Address field displays the details as they will be extracted into documents. This field is constructed on the fly as details are added to the record.

**Communication Details**

This field contains communication details for the name record currently being maintained. To create a new communication detail click on the New button at the bottom of the form. An unlimited number of communication details may be added to the name record.

The same communication detail may be added more than once to a single name record. e.g. Home Phone number could be added twice.

If the Communication Details have not been defined in the Parameter option, there will be no option to add them via Maintenance.

Note: Communication and Information Details panels have been moved so they are side-by-side to accommodate the new Mailing Address field. As such, both panels now share the Up/Down Move buttons used to resequence entries within each panel. The Up/Down buttons will now take effect upon the row in the panel which has focus.

**Information Details**

This field contains information details for the name record currently being maintained. To create a new information detail click on the New button at the bottom of the form. An unlimited number of information details may be added to the name record.

The same information detail may be added more than once to a single name record. e.g. Employee ID could be added twice.

If the Information Details have not been defined in the Parameter option, there will be no option to add them via Maintenance.

Note: Communication and Information Details panels have been moved so they are side-by-side to accommodate the new Mailing Address field. As such, both panels now share the Up/Down Move buttons used to resequence entries within each panel. The Up/Down buttons will now take effect upon the row in the panel which has focus.

**Roles Button (Company Name)**

By pressing the Roles button, existing Role records can be viewed. Roles are the links to other system applications for the selected name

For example

A name may have Roles of Property Owner, Applicant etc.

A name may also be related to another name e.g. Company A may be the parent company to Companies B and C. Similarly, Companies B and C have child relationships with Company A.

If no application roles exist then a message will be displayed.

### Address Button (Company Name)

By pressing the Address button, the default address details for the current name may be maintained.  
Existing application address details can be viewed.  
At least one Default Address must exist for each Personal Name.

## Information Type Pop Up Form

From Personal Name Maintenance, you have the ability to insert Information Types that have been predefined in the Name and Address Parameters. When you click to insert an Information Type a Pop Up Form will display.

Information Type	Applies To
Australian Company No	Company Name
Council Areas	Person & Company
Line of Business	Company Name
Test type	Company Name

**Search Profile**

Information Type

*Information Type Pop Up Form*

### Information Type

The Information Type provides you with a list of the predefined Fields that may be selected.

### Applies To

The Applies To field shows which Role this Information Type is specific to.

### Search Profile - Information Type

This field enable a specific Information type code to be entered, to tailor the display of the Application Information details.

The Applies To button may be used to select available types to tailor the display

## Communication Type Pop Up Form

From Personal Name Maintenance, you have the ability to insert Communication Types that have been predefined in the Name and Address Parameters. When you click to insert a Communication Type a Pop Up Form will display.

Communication Type	Applies To
Alternate Phone Number	Personal Name
Business Phone Number	Personal Name
E-Mail Address	Person & Company
Fax Number	Person & Company
Home Phone Number	Personal Name
Mobile Phone Number	Personal Name
Pager Number	Person & Company
NickName	Personal Name

**Search Profile**

Communication Type

**Search** **Select** **Close**

*Communication Type Pop Up Form*

### Communication Type

The Communication Type provides you with a list of the predefined Fields that may be selected.

### Applies To

The Applies To field shows which Role this Communication Type is specific to.

### Search Profile - Communication Type

This field enables a specific Information Type Code to be entered, to tailor the display of the Application Communication details.

The Applies To button may be used to select available Types to tailor the display

## Duplicate Name Pop Up Form

When adding a NEW name to the system, if the Duplicate Name Parameters have been defined via the System Parameters, the Duplicate Name Pop Up form may be displayed.

This Form presents a list of possible duplicates relating to the name being created. The ability to Select an existing name from the list or return to the Name Entry form is available.

*Duplicate Name Pop Up Form*

### Name and Address

This field contains a list of potential duplicate matches. The matching is based on the System Parameters defined.

For example:

Matching may occur on the first 5 characters of a Surname or the first 10 characters of a Company Name. A name may be selected from this list if it is the same as the name being entered, otherwise Cancel will return to the Maintenance option to enable Name entry to continue.

### Name Details

The Identity box contains details available for the name highlighted on the Duplicate Name Pop Up.

For example :

Address details will display for the highlighted name.

Double Click on the field to "Zoom" to full view or use the scroll bar to scroll up and down the field.

This additional detail can assist in determining whether the Name is a true duplicate.

### Application Mailing Address Details

This box displays any overriding mailing addresses which apply to any application Role Types for the name selected. The format will display as per the following:

Applicant: 201 Greenhill Road EASTWOOD SA 5063  
 Ratepayer: 44 Glen Osmond Road EASTWOOD SA 5063

Only 'Current' Role and Address links will display (i.e. Not Historic)

If 'Ability to view Names under Privacy Act' has been turned OFF in Name and Address security, then these details will not display for names which have been flagged as 'Private'. A message: 'NOT AUTHORISED TO THIS INFORMATION' will display instead.

If 'Other Application Address' has been set to NON-DISPLAY in Name and Address Security, then these details will not display from other applications.

### Name History Enquiry

The Name History Enquiry form now includes a "Details" column and summary box for both the Smart Client and Thick Client.

The “Details” column indicates the nature of the modification that resulted in the Name History being recorded. As focus is placed on a Name History record the “Details” summary box is updated to show the modifications that were performed.

A Name History record will also be recorded for each Name merged into another name. The “Details” summary box will include the Name History information for the Name that was deleted as a result of the merge. This will retain the Name History associated with each name that was deleted by the merge process as a consolidated Name History record.

Effective To	Name Type	Company / Given Names & Surname	Details	User Identifier
29-Jul-2010	Personal Name	Michael James Liet	Multiple changes	MLIET
29-Jul-2010	Personal Name	M J Liet	Name Merge	MLIET
29-Jul-2010	Personal Name	Mick J Liet	Name Merge	MLIET
29-Jul-2010	Personal Name	Michael Liet	Name Merge	MLIET
29-Jul-2010	Personal Name	Michael James Liet	Title change	MLIET

**Details**

Multiple changes  
 Gender change  
     From: Unknown  
     To: Male  
 Date of Birth change

*Thick Client Name History Enquiry showing the “Details” summary box for the modification performed on 29-Jul-2010*

Note also on the Name History Enquiry image shown that there are 3 other rows shows as “Name Merge”. These indicate that 3 Names, “M J Liet”, “Mick J Liet” and “Michael Liet” were merged into this “Michael James Liet” record. The “Multiple Changes” row shows the changes that resulted from the consolidation of the 3 Names into the main “Michael James Liet” record.

If the “Name Merge” rows are selected it will also show if any Name History was merged from the original. Eg. For the “Mick J Liet” row, the following summary box shows that previously the Date of Birth had been updated on that name.

**Details**

Name Merge  
     From: Mick J Liet  
 29-Jul-2010 14:27:25 by MLIET Date of Birth change  
     From:  
     To: 28-Mar-1970

Name History Enquiry
X

Close

Ready. [CSYI\_00054]

Name Details

Formatted Name Michael James Liet

Name History (All 5 records)

Effective To	Name Type	Company / Given Names & Surname	Details	User Identifier
29/07/2010 3:47:04 PM	Personal Name	Michael James Liet	Multiple changes	MLIET
29/07/2010 3:47:02 PM	Personal Name	M J Liet	Name Merge	MLIET
29/07/2010 3:47:01 PM	Personal Name	Mick J Liet	Name Merge	MLIET
29/07/2010 3:47:00 PM	Personal Name	Michael Liet	Name Merge	MLIET
29/07/2010 2:12:31 PM	Personal Name	Michael James Liet	Title change	MLIET

Details

Multiple changes  
Gender change  
From: Unknown  
To: Male  
Date of Birth change  
From:  
To: 28-Mar-1970  
Name Category change  
From:  
To: EMPLOY - Employee

Smart Client Name History Enquiry showing the same records.

Previously Name History was recorded when a Company Name, Surname or Given Name value was modified. Auditing could be used on the Personal and Company Name tables to record modifications to other name information.

Due to the critical nature of Name information and relatively low rate of change it was deemed beneficial to record Name History when other information is modified.

For Example:

Changing a Personal Name to a status of "Deceased" will be recorded in Name History.

A Personal Name History is now recorded whenever any of the following field values are modified:

- Surname
- Given Names
- Title
- Deceased
- Private
- Date of Birth
- Gender



- Mailing Salutation
- Legal Name
- Active

A Company Name History will be recorded whenever any of the following field values are modified:

- Company Name
- Government Identity
- Mailing Salutation
- Legal Name
- Active

This modification only captures modifications to the primary name fields and therefore does not eliminate the need to Audit the Name and Address tables.

## Name Contacts

From the Name Maintenance Form (Name and Address Maintenance menu option, or when accessing a Name from any Pathway module maintenance option), there is a new button labelled Contacts.

Note: This button is only visible where at least one Contact Type has been defined in the parameters.

When selecting the Contact Button (refer to section on Security) the Name Contact form is presented.

### Name Contact Maintenance

Name Details	
Formatted Name	ABC COMPANY
Formatted Address	Att: Mr J Citizen, 27 Greenhill Rd, WAYVILLE SA 5034

Contact Type		Default Contact	Active
CEO	CEO	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contact Line One Contact Line Two	Att: Mr J Citizen [Empty]		
GENERAL	General Contact - non specific	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Contact Line One Contact Line Two	Att: Ms M White [Empty]		
GENERAL	General Contact - non specific	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Contact Line One Contact Line Two	Development Manager Mr P Peters		

*Name Contact Maintenance Form*

Using the INSERT button, a new Contact record can be added.

The Contact Type is selected from the dropdown (as defined in Contact Types).

Two lines of Contact Details can be entered.

If required, the Contact Line 1 may refer to the Title of the Contact, with Line 2 being the actual name, or just line 1 used. Examples as follows:

Development Manager  
 Mr P Peters  
 Or  
 Just Mr P Peters  
 Or  
 Att: Ms M White  
 Or  
 C/- Ms M White  
 Or  
 Att: Development Manager

Important: If your 'standards' are to use Titles, then these must be entered in the text. If your 'standards' are to use Initials and Surname, then only enter initials etc.

There is no automatic formatting or rules over the Contact Details, they are in effect a free format address line(s) record.

One Contact Type should be set as Default, which infers that this will be applied **automatically** to the Default Address and to any role using the Default Address. (refer to section on suggested implementation strategy).

Important: Should the Default flag be changed from one Contact to another on a Name record, upon acceptance of that change, it will automatically update the Default Address and also all Role records using that Default Address.

## Address Button from Name Record

Once a Contact record has been flagged as the 'Default', it will automatically be applied to the Default Address and positioned within the formatted address, according to the relevant Address Template and the sequence of the Contact Lines.

Any Role that is using that Default Address, will also reference that Contact (as per the example below). I.e.: each role that is linked to the Default Address is also linked to the Default Contact Type.

On the Address Maintenance or Enquiry form, the Name/Contact line will reflect the Contact in use and will be prefixed with (default) where that Contact Type is the Default and has been applied automatically to the Roles.

## Default Address Maintenance – Contacts

**Default Address Maintenance**

**Name Details**  
Formatted Name: ABC COMPANY

**Default Address Details as at Date Effective**  
21-Jul-2005: Att: Mr J Citizen, 27 Greenhill Rd, WAYVILLE SA 5034

**Application Name and Address Details (Current Role View)**  
Property Owner: 7 Adams Lane, ADELAIDE SA 5001  
Name / Contact: ABC COMPANY  
Address: (default)  
Current as of: 21-Jul-2005  
(default) - Att: Mr J Citizen

**Search Profile**  
Role Type: LPA 0 >> Property Owner

Clipboard  
Clipboard

Search Insert Continue Quit

Default Address Maintenance Form

Using the example above, if the Property Role were to require a different Contact Name, but the same Address, the User would perform the following:

Select the Name/Contact Detail Button (above the Mailing Address Detail button), which takes them to a modified Application Mailing Name form.

There is a new line labelled 'Contact' below the existing Mailing Name line.

Using the dropdown selection button, the list of 'active' Contacts' will be displayed allowing selection.

### Application Mailing Name Maintenance – Contacts

**Application Mailing Name Maintenance**

**Name Details**

Formatted Name: ABC COMPANY

**Application Information Details**

Property Owner: 7 Adams Lane, ADELAIDE SA 5001

Status: Current

Creation Date: 21-Jul-2005

**Application Mailing Name Details**

Formatted Name: ABC COMPANY

Mailing Name: (default)

Contact: (GENERAL) - Development Manager, Mr P Peters

**Options**

☒ Contacts ☐ Company Name Role Sequence

Continue Quit

*Application Mailing Name Maintenance Form*

Where a Contact is selected, the Contact details will be applied to that Role only and to either the Default Address (where that Role is linked to the Default Address) or the Overriding Application Mailing Address (where that Role is linked to an Application Mailing Address).

Upon returning to the Address Maintenance Form, the Role will reflect the selected Contact and will not display (default), but will be prefixed by the Contact Type.

### Default Address Maintenance

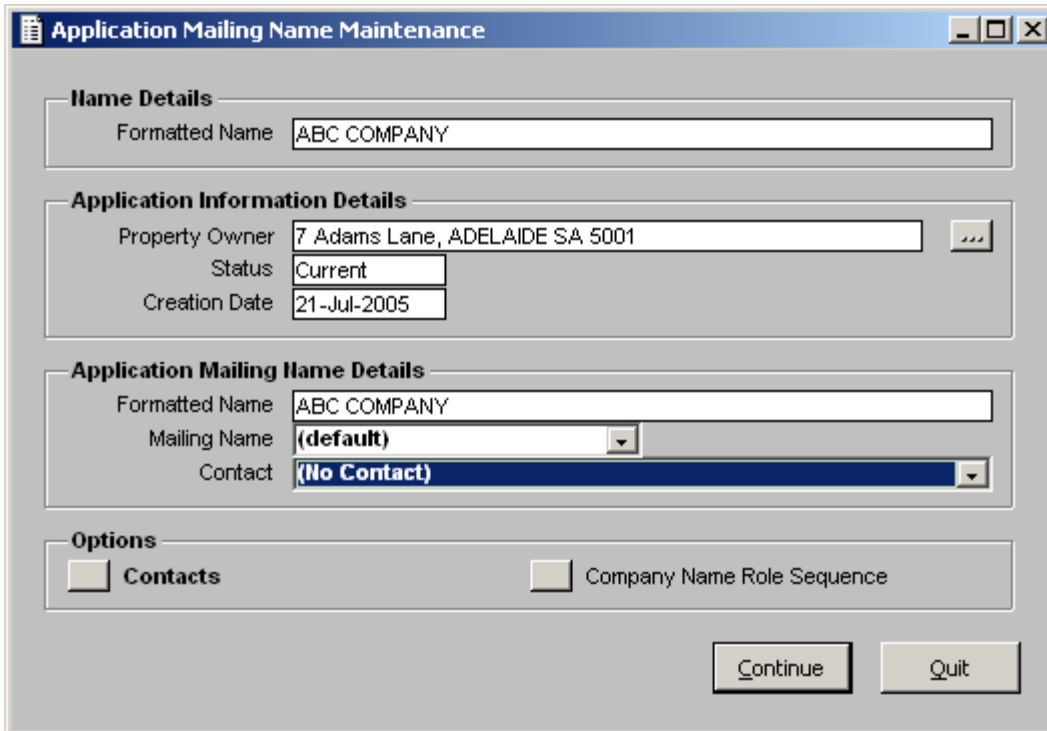
*Default Address Maintenance Form*

If the required Contact is NOT in the dropdown list, from this Form, the User can select the Contacts Button and add a new Contact to that Name record, and then subsequently use that Contact record.

The selected Contact will be displayed in the Contact line, prefixed with the Contact 'Type'

If this Role is to utilise the Default Address BUT NOT the Default Contact and no Contact is required, the user can select the dropdown selection button and select the 'No Contact' option. This effectively removes the use of the Default Contact and leaves that Role utilising the standard address only.

In this situation, the display shows (No Contact)



**Application Mailing Name Maintenance**

**Name Details**  
Formatted Name: ABC COMPANY

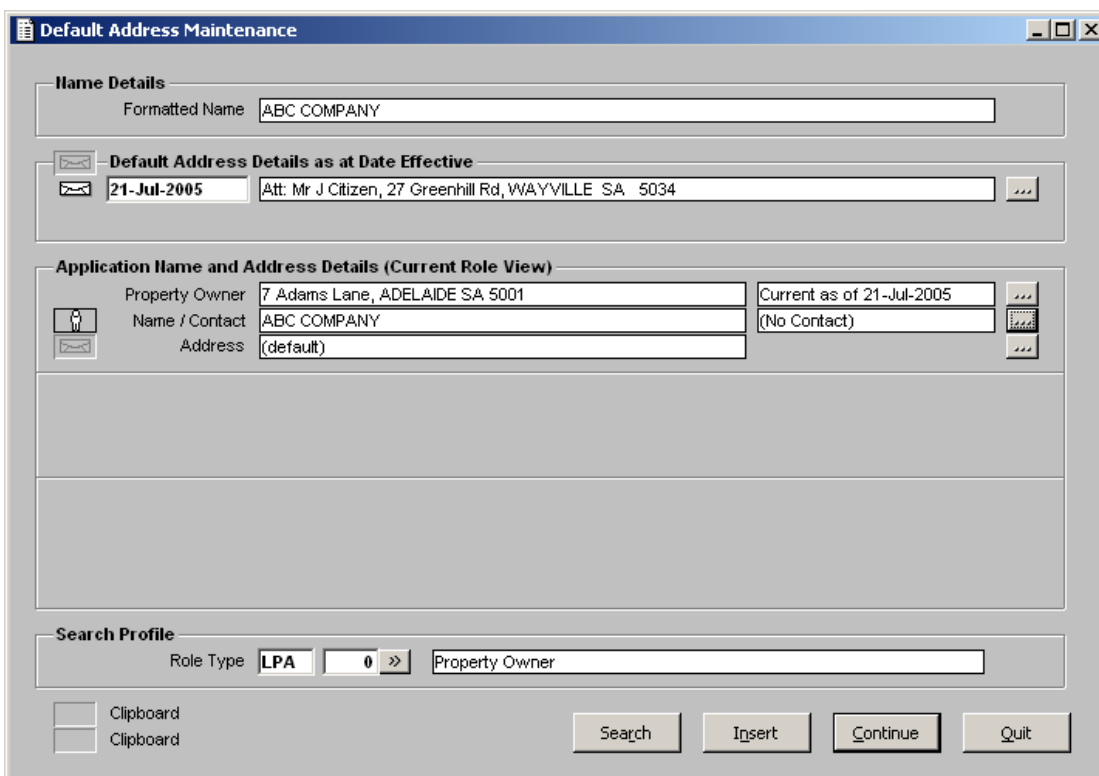
**Application Information Details**  
Property Owner: 7 Adams Lane, ADELAIDE SA 5001  
Status: Current  
Creation Date: 21-Jul-2005

**Application Mailing Name Details**  
Formatted Name: ABC COMPANY  
Mailing Name: (default)  
Contact: (No Contact)

**Options**  
☐ Contacts ☐ Company Name Role Sequence

Continue Quit

Application Mailing Name Maintenance Form



**Default Address Maintenance**

**Name Details**  
Formatted Name: ABC COMPANY

**Default Address Details as at Date Effective**  
21-Jul-2005 Att: Mr J Citizen, 27 Greenhill Rd, WAYVILLE SA 5034

**Application Name and Address Details (Current Role View)**  
Property Owner: 7 Adams Lane, ADELAIDE SA 5001  
Name / Contact: ABC COMPANY  
Address: (default)  
Current as of 21-Jul-2005  
(No Contact)

**Search Profile**  
Role Type: LPA 0 >> Property Owner

☐ Clipboard ☐ Clipboard

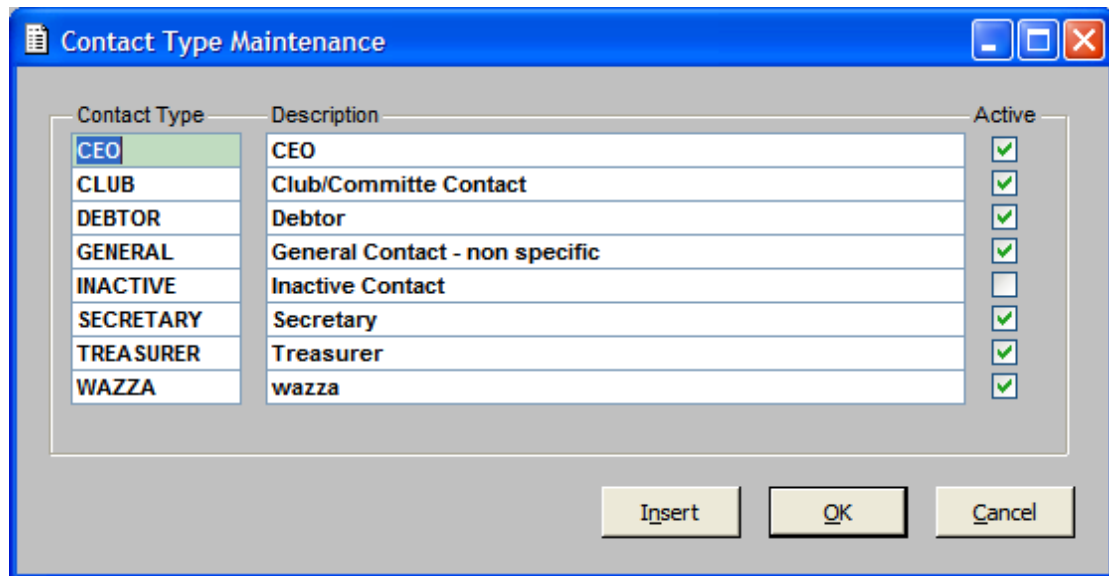
Search Insert Continue Quit

Default Address Maintenance Form

Important: An Overriding Application Mailing Address is NOT required, if the Contact is all that is to be changed.

## How to extract Name Contact Details into a document

1. Set up the Contact Type Parameters in Name and Address Parameters

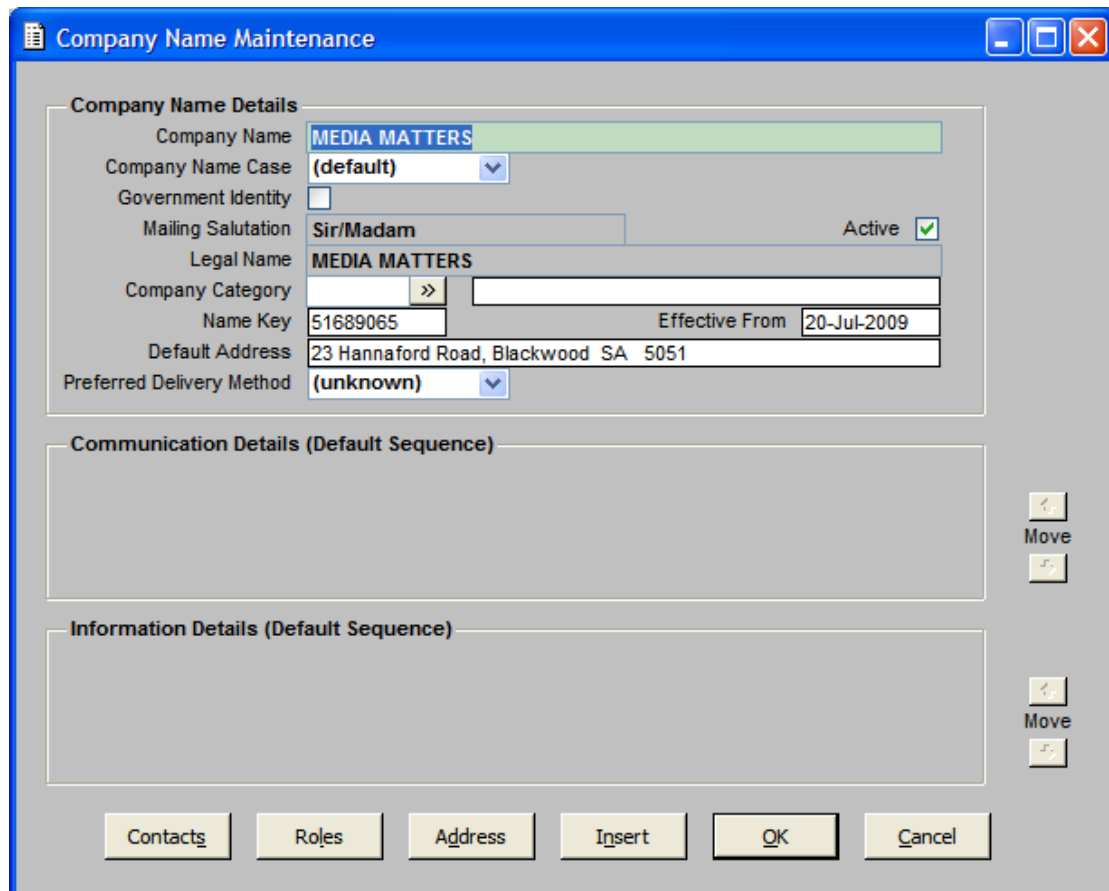


**Contact Type Maintenance**

Contact Type	Description	Active
CEO	CEO	<input checked="" type="checkbox"/>
CLUB	Club/Committee Contact	<input checked="" type="checkbox"/>
DEBTOR	Debtor	<input checked="" type="checkbox"/>
GENERAL	General Contact - non specific	<input checked="" type="checkbox"/>
INACTIVE	Inactive Contact	<input type="checkbox"/>
SECRETARY	Secretary	<input checked="" type="checkbox"/>
TREASURER	Treasurer	<input checked="" type="checkbox"/>
WAZZA	wazza	<input checked="" type="checkbox"/>

Buttons: Insert, OK, Cancel

- Set up a Name with a default address.



**Company Name Maintenance**

**Company Name Details**

Company Name: MEDIA MATTERS

Company Name Case: (default) ▼

Government Identity: ☐

Mailing Salutation: Sir/Madam

Legal Name: MEDIA MATTERS

Company Category: >> [ ]

Name Key: 51689065

Effective From: 20-Jul-2009

Default Address: 23 Hannaford Road, Blackwood SA 5051

Preferred Delivery Method: (unknown) ▼

Active: ☒

**Communication Details (Default Sequence)**

**Information Details (Default Sequence)**

Buttons: Contacts, Roles, Address, Insert, OK, Cancel

Move buttons: [ ] Move [ ] Move

- Click the Contacts button and set up some Contacts

**Name Contact Maintenance**

**Name Details**

Formatted Name: MEDIA MATTERS  
Formatted Address: 23 Hannaford Road, Blackwood SA 5051

**Contact Type**

**GENERAL** >> General Contact - non specific  
Contact Line One: Att: The Secretary  
Contact Line Two:   
☒ Default Contact ☒ Active

**CEO** >> CEO  
Contact Line One: The Manager  
Contact Line Two: Mr S Smythe  
☐ Default Contact ☒ Active

Buttons: Insert, OK, Cancel

4. Make one of the Names the default
5. Save the details
6. In Bookings Management create a new Booking Request using the above company as the Customer

**Booking Entry**

Booking Class: CASHCLASS Cash Bookings Class (Cash - no override)  
Booking Number: 1387 System Entered DateTime: 26-Jul-2009 13:51:28  
Receiving Office: ECHC Edit Choice

Booking Status: CONFIRMED Confirmed  
Activity Type: DANCE Dance  
Activity Sub-Type: BARN Barn Dance  
Activity Fee Discount: CHARITY Charity Discount  
Customer Type: PUBLIC Public user  
Responsible Office: ECHC Edit Choice

Activity Name: Dance  
Activity Details:   
Customer: MEDIA MATTERS  
Contact:   
Attendees: 0  
Significant Booking: ☐ Internal Booking: ☐ Recurring Booking: ☐

Booking Date: Start Time: End Time: Facility:   
Description: Dance

Booking Source:   
Amount Owning: 0.00  
Overpayment Amount: 0.00

**Names**  
Customer - MEDIA MATTERS

**Fee Summary**  
Activity Fees: 0.00  
Bond: 0.00 Other: 0.00  
Facility Fees: 0.00  
Bond: 0.00 Other: 0.00

**Location Summary**  
  
Status: (default) Location: Resources Fees Recurrence

Options:  
Activity Fees ☐  
Affected Properties ☐  
Conditions ☐  
Customer Service ☐  
Documents ☐  
Linked Requests ☐  
Notes ☐  
References ☐  
Responses ☐  
Workflow ☐

Buttons: Fee Summary, Copy, Insert, OK, Cancel

7. Double click in the Names window to display the Booking Name Role Maintenance form. Detail out on the Name record and click the Address button to display the Default Address Maintenance form.



**Default Address Maintenance**

**Name Details**  
Formatted Name: MEDIA MATTERS

**Default Address Details as at Date Effective**  
20-Jul-2009 23 Hannaford Road, Blackwood SA 5051

**Application Name and Address Details (Current Role View)**  
Customer: Booking: 1087 - Booking Class: Cash Bookings Class (Cash - no)  
Name / Contact: MEDIA MATTERS  
Address: (default)

**Search Profile**  
Role Type: ABK 1 >> Customer

67 Bridge ST  
13 Madison St, Kensington SA 5068

Search Insert OK Cancel

8. You will notice that the default Contact details appear on the Name/Contact row of the Role record.
9. Detail out on the Name/Contact line to display the Application Mailing Name Maintenance form.
10. The Contact details should display.

**Application Mailing Name Maintenance**

**Name Details**  
Formatted Name: MEDIA MATTERS

**Application Information Details**  
Customer: Booking: 1087 - Booking Class: Cash Bookings Class (Cash - no)  
Status: Current  
Creation Date: 20-Jul-2009

**Application Mailing Name Details**  
Formatted Name: MEDIA MATTERS  
Mailing Name: (default)  
Contact: (default) - Att: The Secretary  
Preferred Delivery Method: Post

**Options**  
☐ Contacts ☐ Company Name Role Sequence

OK Cancel

11. Click OK. The Contact details are carried through to the Default Address Maintenance form and added to the beginning of the Default Address.

The screenshot shows the 'Default Address Maintenance' window. It contains several sections: 'Name Details' with a 'Formatted Name' field containing 'MEDIA MATTERS'; 'Default Address Details as at Date Effective' with a date field set to '20-Jul-2009' and an address field containing 'Att: The Secretary, 23 Hannaford Road, Blackwood SA 5051'; 'Application Name and Address Details (Current Role View)' with fields for 'Customer' (Booking: 1087 - Booking Class: Cash Bookings Class (Cash - no), Current as of 20-Jul-2009), 'Name / Contact' (MEDIA MATTERS, (default) - Att: The Secretary), and 'Address' ((default)); and a 'Search Profile' section with 'Role Type' set to 'ABK', a page indicator '1 >>', and a search field containing 'Customer'. At the bottom, there are two address entries: '67 Bridge ST' and '13 Madison St, Kensington SA 5068', along with 'Search', 'Insert', 'OK', and 'Cancel' buttons.

12. When OK is pressed, it will update the Company Name Maintenance record.

The screenshot shows the 'Company Name Maintenance' window. It contains several sections: 'Company Name Details' with fields for 'Company Name' (MEDIA MATTERS), 'Company Name Case' ((default)), 'Government Identity' (checkbox), 'Mailing Salutation' (Sir/Madam), 'Legal Name' (MEDIA MATTERS), 'Company Category' (dropdown), 'Name Key' (51689065), 'Effective From' (20-Jul-2009), 'Default Address' (Att: The Secretary, 23 Hannaford Road, Blackwood SA 5051), and 'Preferred Delivery Method' ((unknown)); 'Communication Details (Default Sequence)' with a list box and a 'Move' button; and 'Information Details (Default Sequence)' with a list box and a 'Move' button. At the bottom, there are buttons for 'Contacts', 'Roles', 'Address', 'Insert', 'OK', and 'Cancel'.

13. In Bookings Parameters set up an Extract using the Names Extract List. This Extract List contains 2 fields – Name and Mailing Address.  
e.g.

Name	«Name»
Mailing Address	«Mailing_Address»

14. Include the Extract Type in a Merge Type template and then generate a document in Bookings. The Extract Type details should include the Name Contact details as part of the Mailing Address field.

e.g.

Name	MEDIA MATTERS
Mailing Address	Att: The Secretary 23 Hannaford Road Blackwood SA 5051

## Name Type Conversion

At times, there may be a need to convert a Person Name Type to a Company Name Type, or vice versa. This could come about if an incorrect decision was made during initial data entry, or if an incorrect Name Type was assigned during the data conversion process.

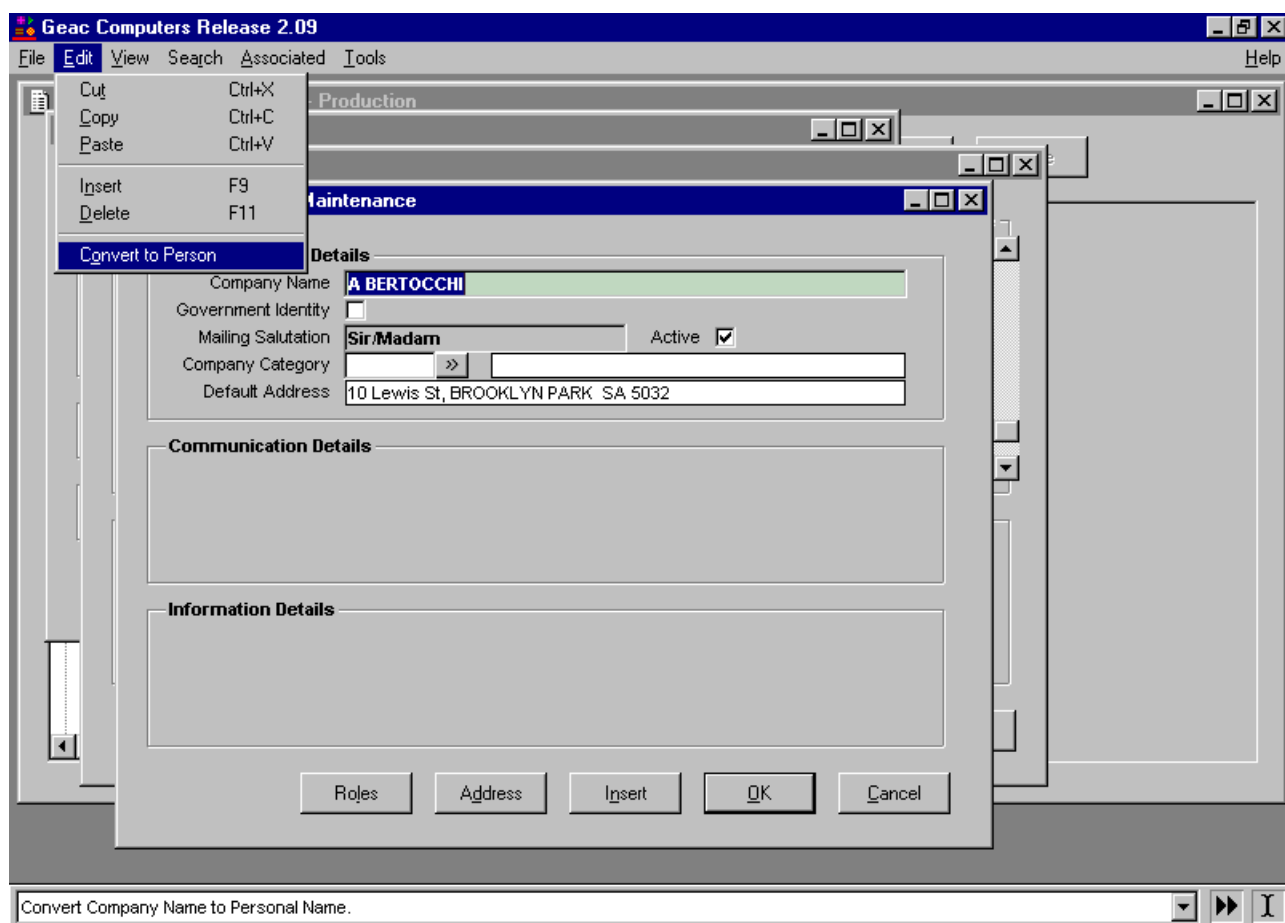
The facility to perform name type conversion is available from the Name and Address Maintenance menu option. It is not possible to perform a name type conversion when maintaining names from another application menu option.

**Note:** Surname, Given Names and Company Name Case Conversion settings are not retained when a name is converted. All case conversion fields will return to the (default) value upon conversion.

### Converting a Company Name to a Personal Name

This function can be carried out from the Company Name Maintenance Form with the record to be converted displayed on the screen.

Select the 'Convert to Person' option from the Edit Pull Down Menu.



Upon selection of the 'Convert to Person' pull down menu option a message displays to confirm that a name type transfer is required.

If the conversion is confirmed then the Company name is transferred to a Surname and the Personal Name Maintenance form is automatically displayed to allow any manual changes to be performed.

**Note:** The Government Identity information is not copied as there is no corresponding data element in a Personal Name.

All Communication, Information, Address and Role details are transferred to the Personal Name.

**Personal Name Maintenance**

**Personal Name Details**

Surname: A Bertocchi

Given Names:

Title: >> Gender: Unknown

Deceased: ☐ Private: ☐ Date of Birth:

Mailing Salutation: A Bertocchi Active: ☒

Legal Name: A Bertocchi

Person Category: >>

Name Key: 1189 Effective From: 31-Mar-2005

Default Address: 10 Lewis St, BROOKLYN PARK SA 5032

Surname Case: (default) Given Names Case: (default)

**Communication Details (Default Sequence)**

**Information Details (Default Sequence)**

Move

Move

Roles Address Insert OK Cancel

## Converting a Personal Name to a Company Name

Select the 'Convert to Company' option from the Edit Pull Down Menu to transfer the Surname to a Company Name.

**Note:** The Given Names, Title, Gender, Date of Birth, Deceased and Private information is not copied as there are no corresponding data elements in a Company Name.

All Communication, Information, Address and Role details are transferred to the Company name. All other aspects are identical to the Company to Personal Name conversion process.

## Eligibility for Conversion

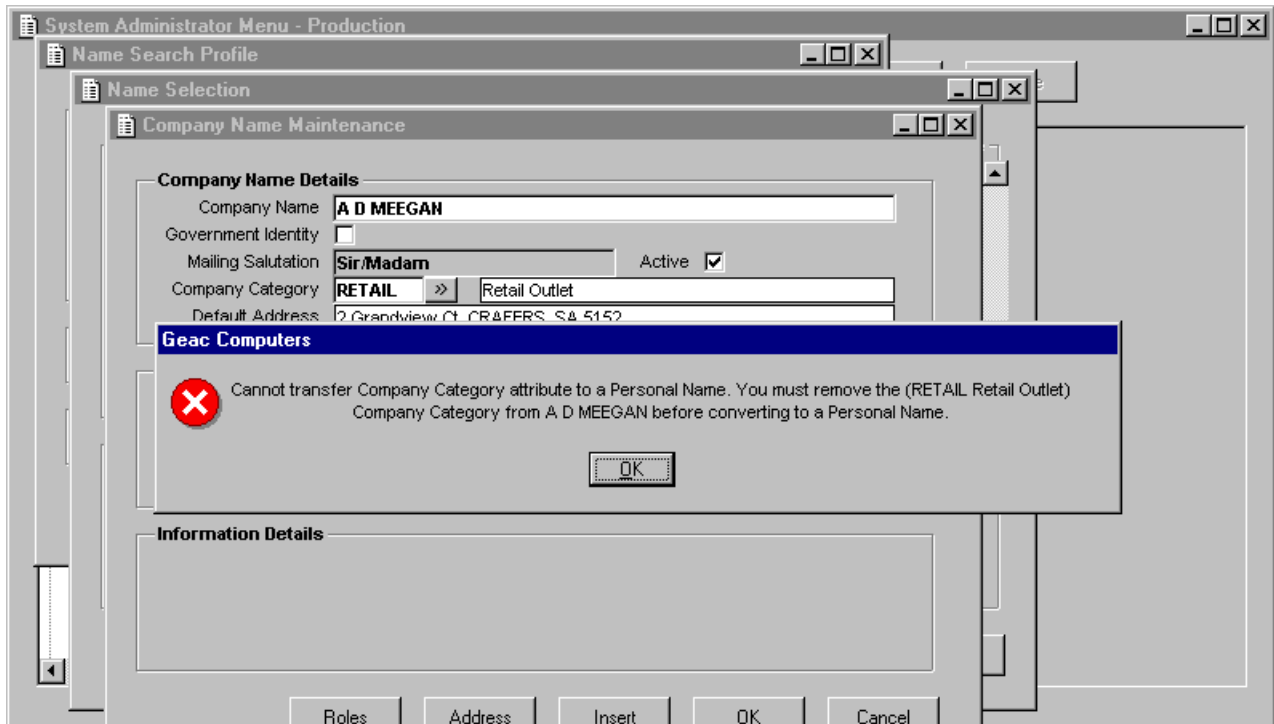
A number of checks are performed prior to allowing a Name Type conversion.

### ❑ **Company and Personal Name Types.**

It is not possible to perform a name conversion if a Company Name Type exists on a Company Name or Personal Name Type exists on a Personal Name.

An error message is issued to indicate that the Name Type must be removed prior to performing the conversion.

For Example:



### *Disparate Communication and Information Types*

It is not possible to perform a name conversion if Company specific Communication or Information details exist on the Company Name or Person specific Communication or Information details exist on the Personal Name.

An error message is issued to indicate when this situation occurs.

For Example:

**Company Name Maintenance**

**Company Name Details**

Company Name: A D MEEGAN

Government Identity: ☐

Mailing Salutation: Sir/Madam Active: ☒

Company Category: >>

Default Address: 2 Grandview Ct, CR4FFERS, SA 5152

**Communication Details**

Business Phone:

**Information Details**

ACN: 390875654737

Roles Address Insert OK Cancel

**Geac Computers**

Cannot transfer ACN Company Information details to Personal Name.

OK Help...

If you have a significant number of names requiring conversion that also have disparate Information or Communication details then a 'Name Type Transfer' Communication and Information Type can be created to assist with the transfer of data. This is created within Name and Address System Parameters / Communication Type Maintenance (or Information Type Maintenance).

Help Information on the previous error message:

**System Administrator Menu - Production**

**Name Search Profile**

**Name Selection**

**Company Name Maintenance**

**Company Name Details**

Company Name: A D MEEGAN

Government Identity: ☐

Mailing Salutation: Sir/Madam Active: ☒

Company Category: >>

Default Address: 2 Grandview Ct, CR4FFERS, SA 5152

**Communication Details**

Business Phone:

**Information Details**

ACN: 390875654737

Roles Address Insert OK Cancel

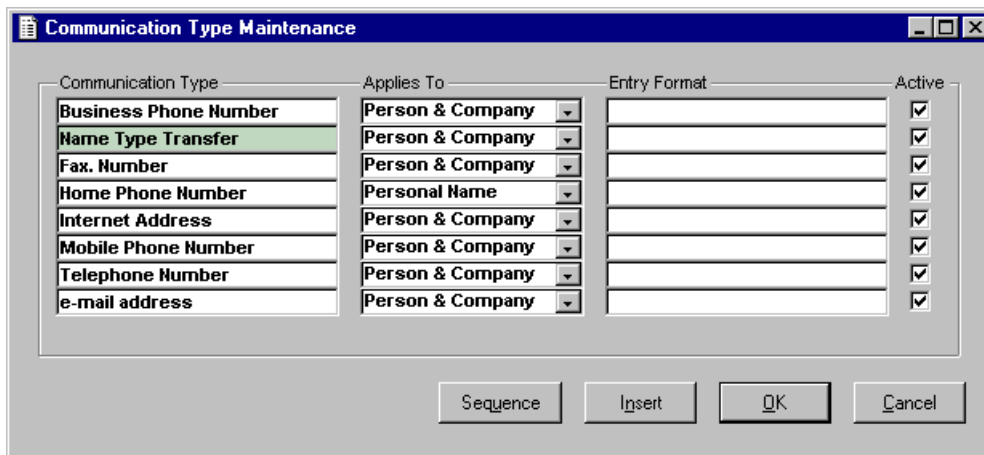
**Geac Computers**

Create an Inactive Communication and Information Type with a Description of 'Name Type Transfer' applicable to both Company and Personal Names. This Communication and Information type will facilitate the transfer of disparate details between Company and Personal Names.

OK

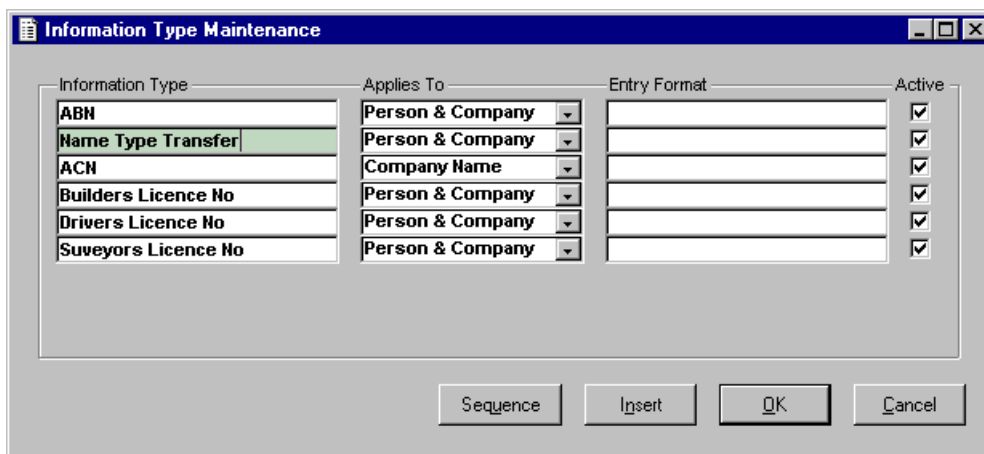
If you create a 'Name Type Transfer' Communication and Information Type then ensure that they apply to both Company and Personal Names and that they are marked as INACTIVE to prevent these types being manually selected during name maintenance.

For Example:



The 'Communication Type Maintenance' dialog box contains a table with four columns: 'Communication Type', 'Applies To', 'Entry Format', and 'Active'. The 'Name Type Transfer' row is highlighted. Below the table are buttons for 'Sequence', 'Insert', 'OK', and 'Cancel'.

Communication Type	Applies To	Entry Format	Active
Business Phone Number	Person & Company		<input checked="" type="checkbox"/>
Name Type Transfer	Person & Company		<input checked="" type="checkbox"/>
Fax. Number	Person & Company		<input checked="" type="checkbox"/>
Home Phone Number	Personal Name		<input checked="" type="checkbox"/>
Internet Address	Person & Company		<input checked="" type="checkbox"/>
Mobile Phone Number	Person & Company		<input checked="" type="checkbox"/>
Telephone Number	Person & Company		<input checked="" type="checkbox"/>
e-mail address	Person & Company		<input checked="" type="checkbox"/>



The 'Information Type Maintenance' dialog box contains a table with four columns: 'Information Type', 'Applies To', 'Entry Format', and 'Active'. The 'Name Type Transfer' row is highlighted. Below the table are buttons for 'Sequence', 'Insert', 'OK', and 'Cancel'.

Information Type	Applies To	Entry Format	Active
ABN	Person & Company		<input checked="" type="checkbox"/>
Name Type Transfer	Person & Company		<input checked="" type="checkbox"/>
ACN	Company Name		<input checked="" type="checkbox"/>
Builders Licence No	Person & Company		<input checked="" type="checkbox"/>
Drivers Licence No	Person & Company		<input checked="" type="checkbox"/>
Surveyors Licence No	Person & Company		<input checked="" type="checkbox"/>

If the 'Name Type Transfer' Communication and Information Types have been created then it is possible to perform a Name Type conversion even when disparate Information or Communication Types exist on the name.

For Example:



**Company Name Maintenance**

**Company Name Details**

Company Name: A D MEEGAN

Government Identity: ☐

Mailing Salutation: Sir/Madam Active: ☒

Company Category: >>

Default Address: 2 Grandview Ct, CRAFERS SA 5152

**Geac Computers**

Name Type Changed. Items to Check: 'Name Type Transfer' Information details.

OK

**Information Details**

ACN: 390875654737

Roles Address Insert OK Cancel

The information message indicates that the 'Name Type Transfer' Information Type was utilized and some manual checking needs to be performed.

Result of Transfer:

**Personal Name Maintenance**

**Personal Name Details**

Surname: A D Meegan

Given Names:

Title: >> Gender: Unknown

Deceased: ☐ Private: ☐

Date of Birth:

Mailing Salutation: A D Meegan Active: ☒

Person Category: >>

Default Address: 2 Grandview Ct, CRAFERS SA 5152

**Communication Details**

Business Phone: 08 8394587

**Information Details**

Name Type Transfer: 390875654737=ACH

Roles Address Insert OK Cancel

Note how the Company Information Type description from which the details were copied is automatically appended to the actual data.

## Role Maintenance / Enquiry

This section describes the display of all Application Role associations to the current name record.

A relationship can also be set up between names (Company and Personal) to create links between them. e.g. A parent company can be related to one or more child companies.

Each relationship is classified as a role type and these role types are user-defined.

Example: A large corporation has several offices within the municipality. Therefore a separate name and address is created for each - AMP Head Office, AMP Eastwood Branch, AMP Marketing Division. However, Council wishes to record that each of these are part of the same company, AMP. Each of these names is therefore related to the AMP name using a "parent company" role type. This allows each of the affiliated companies to be identified by selecting the parent company and viewing the related roles.

To create a relationship the following steps can be taken:

- In Name selection, select a company to which you wish to assign a parent role type.
- Press the Modify button
- Press the Roles button
- Press Insert to add a new Role Type.
- Select the "Parent" Role Type e.g. Burnsdale Village
- Search for and select a company which you wish to affiliate with the above company. e.g. Bakers Delicacies
- The Application Role Maintenance Form will then display Burnsdale Village with a new role type of "parent", listing Bakers Delicacies as the company to which it is a parent.
- If an enquiry is done into the roles of Bakers Delicacies it should display a role of "child" with Burnsdale Village being the company to which it is related.

A pull down menu option is available to limit the Role linkages displayed. This option is available from the View Menu at the top of the screen. The options available for selection are:

View Current and Historic Roles

View Current Roles

View Historic Roles

View Roles with Mailing Overrides

The default option will display Current Roles.

[illegible]

## Application Role Maintenance Form

This form displays all Application Role associations to the current name record. The ability to view further information on each Role Type is available via the Detail button. This form displays when the Roles Button is pressed from the Name Maintenance forms.

When viewing Roles for any Name record, the ability exists to select the view required, Historic, Current and Default or the default of Current. These views can be invoked via the VIEW option from the menu pull down and provide the ability to see the 'view' that has been invoked on the Frame label for both Role and Address. e.g.: By selecting the View of 'Current and History', both current and historic role records will be displayed and 'Current and Historic' will be displayed in the heading.

By Highlighting the Role Type, the role details will be displayed in the lower half of the form. Customers can then choose to view the further Role details if required.

**Application Role Maintenance**

**Name Details**

Formatted Name: A J Smith  
 Default Address: 221-229 Melbourne St, NORTH ADELAIDE SA 5006

**Role Type Summary (Current Role View)**

Role Type	Role Name	Count
ABK	Bookings Management	Customer
ABK	Bookings Management	Affected Party
ABK	Bookings Management	Affected Party
ACR	Customer Service	Customer
CCP	Customer Profile	Customer
CRG	Registers	Register
LAN	Animal Control	Owner

**Search Profile**

Role Type:  >>

**Customer Details (Current Role View)**

Booking: 211 - Booking Class: Functions Booking Class (Debtors - override), Activity Type: D Current as of 08-Mar-2005

Buttons: Delete, Insert, Search, Close

*Application Role Maintenance Form*

The following form displays when selecting Application Role records from other applications, e.g. Animals, Property. This form is display only and cannot be maintained. Multi-selection of Role records is available.

**Application Role Enquiry**

**Name Details**

Formatted Name: Miss A Smith

Default Address: 67 Stanth Ave, Sydney NSW, 2001

**Role Type Summary (Current and Historic Role View)**

LPA Property Administration Property Owner Roles: 58

**Search Profile**

Role Type: LPA 0 Property Owner

**Property Owner Details (Current and Historic Role View)**

3B/1 Madison Street, Kensington SA 5068	Current as of 15-Oct-2010
2A/1 Madison Street, Kensington SA 5068	11-Nov-2009 To 11-Nov-2009
1/1 Madison Street, Kensington SA 5068	15-Oct-2008 To 03-Dec-2008
"Big House", 2/1 Madison Street, Kensington SA 5068	Current as of 31-Jul-2008

Modify Close

Application Role Enquiry form

**Formatted Name**

This field contains the formatted name of the current name record. No maintenance or deletion is available on this field.

**Formatted Address**

This field contains the formatted address of the current name record. No maintenance or deletion is available on this field. Clicking the 'envelope' button displays the Mailing Address Enquiry form.

**Role Type Summary (Current and Historic role View)**

These fields provide details of the Role Type being displayed.

**Application Information Details**

This field contains the appropriate role information according to the application role type. No maintenance or deletion is available on this field. A Role record may be maintained by selecting it and clicking the Modify button. Multi-select is available on these records by selecting the first record, holding down the SHIFT key and clicking the last record. Clicking the 'envelope' button displays the Mailing Address Enquiry form.

**Role Link Date**

This field displays the date on which a role link is created and becomes current or lapses and is made historic.

**Detail Button**

By pressing the Details button, you will access the appropriate application depending on the Role type selected. The following additional detail screens can be accessed from the Application Role Enquiry

Role Type	Form displayed
Property Owner	Property Summary
Previous Owner	Transfer Enquiry

New Owner	Transfer Enquiry
Agent	Transfer Enquiry
Occupier	Property Summary
Occupier Nominee	Property Summary
Document Issued	Document Request Enquiry
Applicant	Building Applications Summary
Response Lodged	Response Maintenance
Architect	Development Applications Summary
Parent	Personal/Company Name Enquiry
Contractor	Contractor Maintenance

### Search Profile - Role Type

This field enables a specific role type code (e.g. LPA 1) or Application code (e.g. LPA) to be entered, to tailor the display of the Application Role Type details.

The pop-up button may be used to select available role types codes.

### Insert Button

The Insert Button allows the selection of a User Defined Role Type to be assigned to a name.

## User Defined Role Type Pop Up

This form allows the selection of a User Defined Role Type which can be used to create a relationship between names e.g. Parent and Child.

Role	Description	Reciprocal Role
100	Parent	101
101	Child	100
300	Father	301
301	son	300
401	sibling	401

**Search Profile**

Application: CNA    Name and Address

Role Number:

Description:

Search    Select    Close

*User Defined Role Type Pop Up Form*

### Role

These fields display the Role Type Number and Description. User Defined Role Types have 3 digit numbers.

### Reciprocal Role

These fields display details of Role Types which are related to a corresponding Role Type.

### Search Profile - Application

These fields contain the application code and description in which to create the relationship.

**Search Profile - Role Number**

Enter the Role Type Number on which to search.

**Search Profile - Description**

Enter a Role Type Description e.g. Child, on which to search.

**Name Selection Form**

The Name Selection Form allows the user to select a name for the particular Role Type required.

Name	Address	Active
Green, Benjamin	56 Victoria St, BLACKFOREST SA 5035	<input checked="" type="checkbox"/>
<b>Green, Fred</b>	<b>4/44 Separation Ave, BLACKFOREST SA 5035</b>	<input checked="" type="checkbox"/>
Green, Harold	56 East Tce, BLACKFOREST SA 5035	<input checked="" type="checkbox"/>
<b>Green, Jack</b>	<b>45 East Tce, BLACKFOREST SA 5035</b>	<input checked="" type="checkbox"/>
Green, Jo	1 Georgian Ave, ADELAIDE SA 5000	<input checked="" type="checkbox"/>
<b>Green, Justine</b>	<b>45 East Tce, BLACKFOREST SA 5035</b>	<input checked="" type="checkbox"/>
<b>GREEN, Kevin</b>	<b>59a Gameau Ct, ADELAIDE SA 5000</b>	<input checked="" type="checkbox"/>
Green, Matt-James	Eddi's Escort Agency, C/- Po BOX 67, Kensington	<input checked="" type="checkbox"/>
<b>Green, Nita</b>	<b>45 East Tce, BLACKFOREST SA 5035</b>	<input checked="" type="checkbox"/>

**Name Details**

Communication Details  
 Information Details  
 Application Information Details  
 Current - Customer: 374 - Noisy Neighbour - 11-Jan-200  
 Current - Owner: Reference: 523, Name: Monkey Ma

Application Mailing Address Details  
 Customer: 88 Back Rd, CALLINGTON SA 5254

**Name Search Options**

Surname or Name Type: **GREEN\***  
 Name Type: **Person & Company**  
 Address Qualifier:   
 Given Names:   
 Phonetic: ☐

Document Copy Select New Search Modify Quit

*Name Selection Form*

**Name**

The Name fields list the names available for selection.

**Address**

The Address field lists the address associated with the name .

**Name Details**

The Name Details box lists the relevant details associated with the name that is currently highlighted. Role information will display in descending creation date sequence for each Role Type.

When the entry cursor is placed in the Names Details summary box the system retrieves the first 50 role linkages for the name. If the name has less than 50 role linkages then the Name Details summary box information is completed and presented to the user.

If the name has more than 50 role linkages then a message is presented to the user for every 50 role linkages that are retrieved to construct the Name Details summary information.

i.e.:

*Constructing Name Details summary information. Retrieved lines of Application Information details. Continue retrieving Application Information detail lines, or Truncate the Name Details summary information? [Continue] [Truncate]*

This allows the user to "Truncate" the Name Details summary information at any time during its construction thus avoiding excessive response times.

If a user chooses to truncate the Name Details summary information then a special suffix is appended to the bottom of the information already constructed to indicate that the summary details are not complete.

When a user needs to view all role linkages for a name then the [Roles] button from the Name Maintenance/Enquiry form provides this facility.

### **Application Mailing Address Details**

This box displays any overriding mailing addresses which apply to any application Role Types for the name selected. The format will display as per the following:

Applicant: 201 Greenhill Road EASTWOOD SA 5063

Ratepayer: 44 Glen Osmond Road EASTWOOD SA 5063

Only 'Current' Role and Address links will display (i.e. Not Historic)

If 'Ability to view Names under Privacy Act' has been turned OFF in Name and Address security, then these details will not display for names which have been flagged as 'Private'. A message: 'NOT AUTHORISED TO THIS INFORMATION' will display instead.

If 'Other Application Address' has been set to NON-DISPLAY in Name and Address Security, then these details will not display from other applications.

### **Name Search Options**

The Name Search Entry allows you to use any of the fields to narrow the search criteria. Using the first field to search by Surname or Company name

Adding Given names to the Surname Search will narrow your search down a further level.

Clicking on the Phonetic option will allow you to search for names that "sound like" a particular name. This will help when you are unsure of a Name spelling. Selecting a Personal, Company or Company or Personal name criteria, will also help your Search.

You may also use the Address Qualifier field if you have the address available to you.

### **Document Button**

The document button allows you to produce documents for all the names in the selection form via the word processing interface. For example you could produce mailing labels if you have set up a appropriate merge type in the name and address parameters.

## **Owner - Name Selection Form**

The Identity Selection allows the user to select a name for the particular Role Type required.



Name	Address	Active
PADGETT, Scott	8 Blampied St, WYNN VALE SA 5127	<input checked="" type="checkbox"/>
Page, Whitney	Unit 1/1 Beulah Rd, NORWOOD SA 5066	<input checked="" type="checkbox"/>
Parker, Thomas	19 Blampied St, WYNN VALE SA 5127	<input checked="" type="checkbox"/>
Peterman, Alan	45 High Crs, KENSINGTON SA 5068	<input checked="" type="checkbox"/>
Rahman, Richard	3 Gameau Cl, ADELAIDE SA 5000	<input checked="" type="checkbox"/>
REDFORD, Robert	17 Blampied St, WYNN VALE SA 5127	<input checked="" type="checkbox"/>
REPTILES-R-US	Floor 3, 16-24 Martins Dru, ADELAIDE SA 5000	<input checked="" type="checkbox"/>
Rivers, Jamie	111 Ada St, ADELAIDE SA 5000	<input checked="" type="checkbox"/>
Robinson, Mikey	55 Back Rd, CALLINGTON SA 5254	<input checked="" type="checkbox"/>

**Name Details**

Specific Application Information Details  
 Current - Owner: Reference: 497, Name: matty, Disc:  
 Current - Owner: Reference: 498, Name: fred, Disc:P  
 Communication Details  
 Information Details

Application Mailing Address Details

**Name Search Options**

Surname or Name Type: **Person & Company**  
 Address Qualifier:  
 Given Names:  
 Phonetic: ☐  
 Role Status: **(All)**

Document Search Select Close

Owner - Name Selection Form

## Name

The Name fields list the names available for selection.

## Address

The Address field lists the address associated with the name .

## Name Details

The Name Details box lists the relevant details associated with the name that is currently highlighted.

When the entry cursor is placed in the Names Details summary box the system retrieves the first 50 role linkages for the name. If the name has less than 50 role linkages then the Name Details summary box information is completed and presented to the user.

If the name has more than 50 role linkages then a message is presented to the user for every 50 role linkages that are retrieved to construct the Name Details summary information.

i.e.:

*Constructing Name Details summary information. Retrieved lines of Application Information details. Continue retrieving Application Information detail lines, or Truncate the Name Details summary information? [Continue] [Truncate]*

This allows the user to "Truncate" the Name Details summary information at any time during its construction thus avoiding excessive response times.

If a user chooses to truncate the Name Details summary information then a special suffix is appended to the bottom of the information already constructed to indicate that the summary details are not complete.

When a user needs to view all role linkages for a name then the [Roles] button from the Name Maintenance/Enquiry form provides this facility.

## Application Mailing Address Details

This box displays any overriding mailing addresses which apply to any application Role Types for the name selected. The format will display as per the following:

Applicant: 201 Greenhill Road EASTWOOD SA 5063  
 Ratepayer: 44 Glen Osmond Road EASTWOOD SA 5063

Only 'Current' Role and Address links will display (i.e. Not Historic)

If 'Ability to view Names under Privacy Act' has been turned OFF in Name and Address security, then these details will not display for names which have been flagged as 'Private'. A message: 'NOT AUTHORISED TO THIS INFORMATION' will display instead.

If 'Other Application Address' has been set to NON-DISPLAY in Name and Address Security, then these details will not display from other applications.

### Name Search Options

The Name Search Entry allows you to use any of the fields to narrow the search criteria. Using the first field to search by Surname or Company name

Adding Given names to the Surname Search will narrow your search down a further level.

Clicking on the Phonetic option will allow you to search for names that "sound like" a particular name. This will help when you are unsure of a Name spelling. Selecting a Personal, Company or Company or Personal name criteria, will also help your Search.

You may also use the Address Qualifier field if you have the address available to you.

### Document Button

The document button allows you to produce documents for all the names in the selection form via the word processing interface. For example you could produce mailing labels if you have set up a appropriate merge type in the name and address parameters.

## Overriding Mailing Name and Address Pop Up

This form displays any existing Role Types for the selected Name along with any Overriding Mailing Addresses which may exist. The user is able to accept the default address by selecting the Quit/Close button, or, alternatively, focusing on a Role Type and selecting the Select Button.

**Overriding Mailing Name and Address Pop Up**

**Name Details**  
Formatted Name: Ms Justine Green

**Default Address Details as at Date Effective**  
14-Dec-1998 45 East Tce, BLACKFOREST SA 5035

**Overriding Application Name and Address Details (Current and Historic Role View)**

Customer	374 - Noisy Neighbour - 11-Jan-2001 10:59:32 - Unactioned	Current as of 11-Jan-2001
Name	Ms Justine Green	
Address	88 Back Rd, CALLINGTON SA 5254	Date Effective 05-Feb-1999
Occupier	45 East Terrace, BLACK FOREST SA 5035	15-Dec-1998 To 04-Feb-1999
Name	Ms Justine Green	
Address	88 Back Rd, CALLINGTON SA 5254	Date Effective 05-Feb-1999

**Search Profile**  
Role Type: [ ] [ ] >> [ ]

Search Select Quit

Overriding Mailing Name and Address Pop Up form

### Name Details - Formatted Name

This field displays the formatted current name record. This field is non maintainable. The Formatted Name is based on the System Parameter formatting specified.

**Date Effective**

This field contains the date that the default mailing address became effective. New addresses will Default to the current date, or the current date +1 if a record with the current date already exists. This Date can be maintained if required and must be set the current days date or later.

**Default Address**

This field contains the formatted address that was the default address as at the effective date. By pressing the Detail Button, you will access the "Address Maintenance form". If any changes are made then they will be reflected in the default mailing address. The Date Effective field will not be changed.

**Overriding Application Name and Address Details - Role Type**

This field displays the description of the role type attached to the current name record.

e.g. Document Issued details, Owner role details, Occupier role details.

The Application Role details will be bolded to indicate which Role Record is attached to the current Name record.

The date displayed shows whether the role information is current or historic e.g. Current Date is displayed as 'Current as of 22-Dec-1998' or Historic Date is displayed as '18-Jan-1999 To 22-Jan-1999'.

By pressing the Detail Button, you will access the appropriate application depending on the role type. e.g. selecting this button against an Owner Application Role Type will take you to Title Maintenance/Enquiry form. If the Application Role Type is of Document Issued then you will be presented with the Document Request Maintenance/Enquiry form.

**Overriding Application Name and Address Details - Name**

This field displays the formatted name attached to the Role type displayed on the line above.

**Overriding Application Name and Address Details - Address**

This field displays the formatted mailing address as attached to the Role type displayed on the line above.

If the word (default) appears in this line then the default address is used for this application role type.

If an address is displayed, then for this application role type the displayed mailing address is used.

The adjacent field shows the date on which the mailing address became effective.

**Search Profile - Role Type**

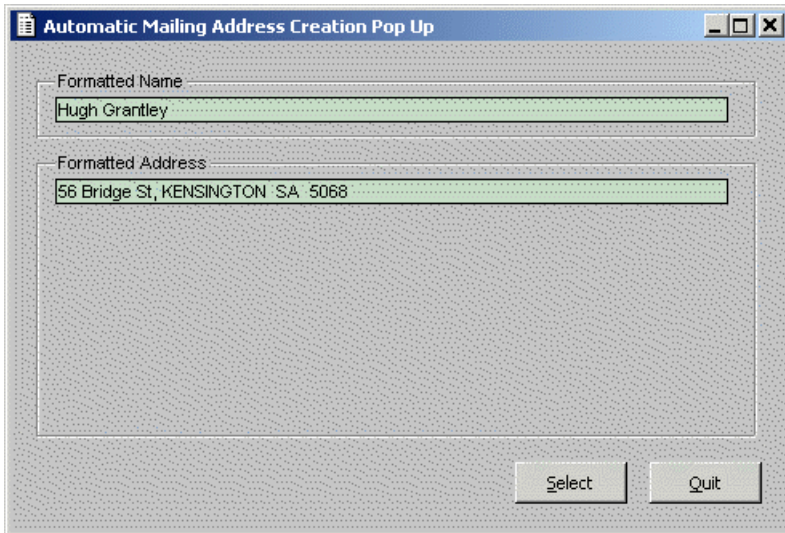
This field enables a specific Role Type code (e.g. LPA 1) or Application code (e.g. LPA) to be entered, to tailor the display of the Application Name and Address details.

The pop-up button may be used to select available Role Type codes.

**Automatic Mailing Address Creation Pop Up Form**

This form displays automatically when a new name which does not have an address is added to a property as a Property Owner, for example. It enables the Property Address to be used in the creation of the Address for the Person/Company.

The Name and Address Role Type (e.g. LPA 0 – Property Owner) must have the "Automatic Address Creation Enabled" flag checked on in Name Role Type Maintenance for this form to display. (see the section on Automatic Address Creation (24) for more details.

A screenshot of a software window titled "Automatic Mailing Address Creation Pop Up". The window has a blue title bar with standard minimize, maximize, and close buttons. Inside, there are two text input fields. The first field is labeled "Formatted Name" and contains the text "Hugh Grantley". The second field is labeled "Formatted Address" and contains the text "56 Bridge St, KENSINGTON SA 5068". Below these fields are two buttons: "Select" and "Quit". The background of the window has a light gray, textured pattern.

*Automatic Mailing Address Creation Pop Up Form*

**Formatted Name**

This field displays the Formatted Name which has been created and added to the Property as a Role Record.

**Formatted Address**

This field displays the Formatted Address which will be used as the Address record for the new Name. This Address is automatically created from the Property Address. (Refer to "Automatic Address Creation enabled" (24) for more details.

## Creating/Maintaining an Address Record

This section describes how to create and/or maintain address records.

### Address Search Profile Form

The Address Search Profile form has two formats, one for Structured Address Templates and one for Free Format Address templates. From this form you may enter a search profile to allow selection of an existing address record. Alternatively you may select the New button to create a New address record.

All Address Search Profile fields convert any text entered to uppercase characters.

When an address search by a structured address component such as Street is performed then all addresses that contain that Street component are displayed regardless of the 'Structured Address' template on which the addresses are based.

To perform an address search over 'Free Format Addresses' the 'Free Format Address' template must first be selected in order to display the format containing the 'Address' search profile field. Any search criteria entered into this field should be delimited by '\*'s do that 'Free Format Addresses' containing the search criteria anywhere within the address are displayed.

**Address Search Profile**

**Search Profile Selection**

Template **1** >> Australian Residential Address

**Search Profile**

Address Key

Property Name

Flat/Unit No/Building

Forwarding

Identifier

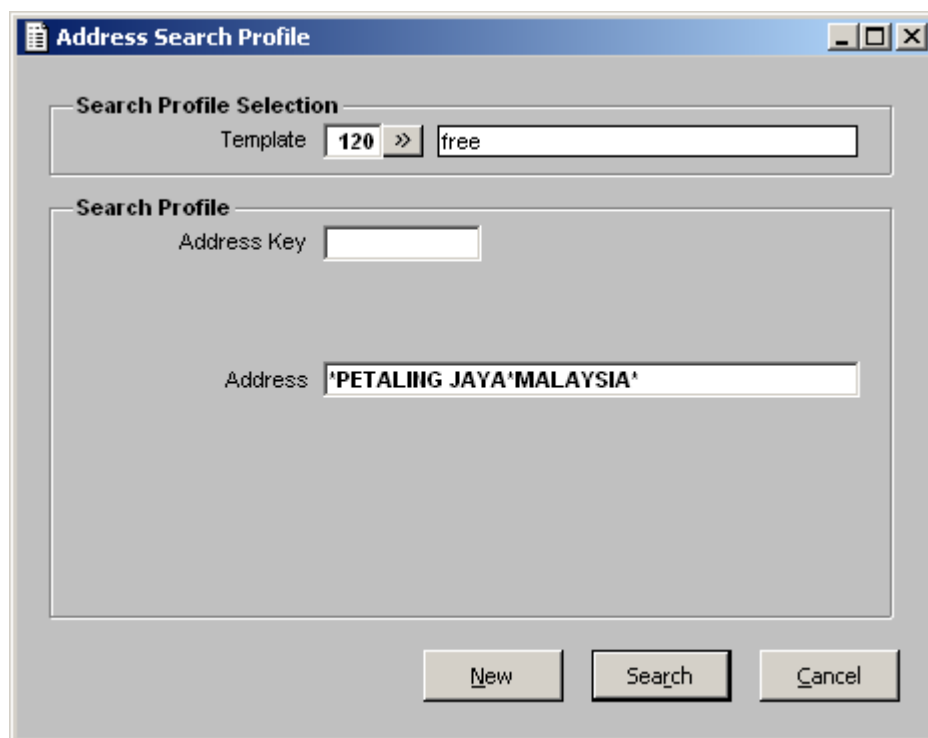
Street  >>

Suburb/Locality  >>

State  >>

Post Code  >>

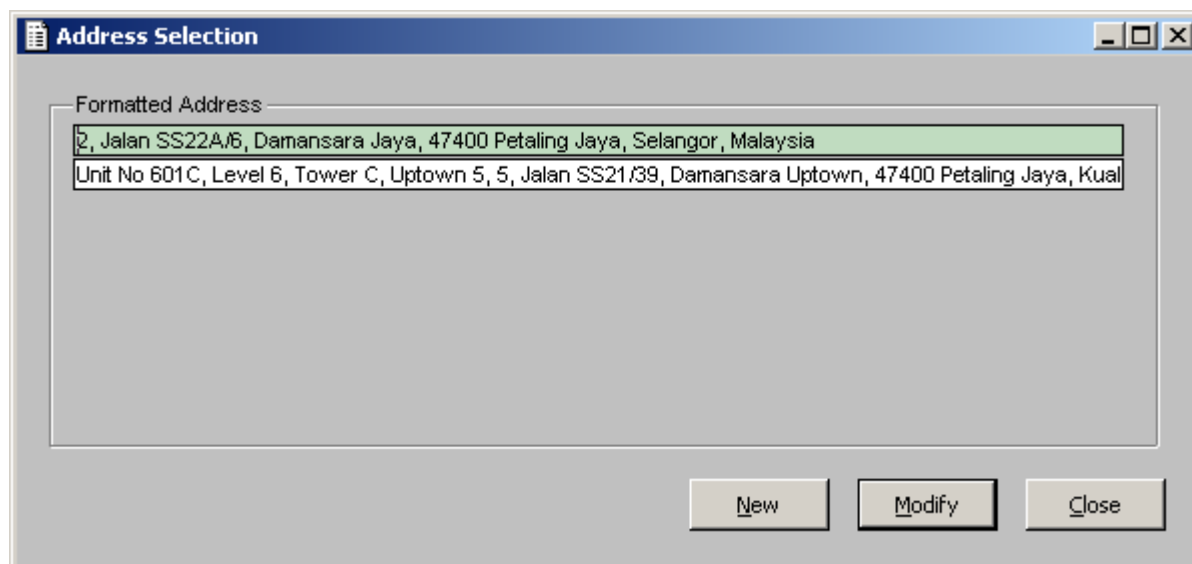
*'Structured Address' Search Profile Form*



The 'Address Search Profile' dialog box has a title bar with a document icon and standard window controls. It contains two main sections. The 'Search Profile Selection' section has a 'Template' label, a dropdown menu showing '120', a right-pointing arrow button, and a text field containing 'free'. The 'Search Profile' section has an 'Address Key' label and an empty text field, followed by an 'Address' label and a text field containing ''PETALING JAYA'MALAYSIA''. At the bottom are three buttons: 'New', 'Search', and 'Cancel'.

*'Free Format Address' Search Profile form*

This search will display any 'Free Format Addresses' that contain 'Petaling Jaya' followed by 'Malaysia' anywhere within the address. Results would be as follows:



The 'Address Selection' dialog box has a title bar with a document icon and standard window controls. It features a 'Formatted Address' label above a list box. The list box contains two entries: '2, Jalan SS22A/6, Damansara Jaya, 47400 Petaling Jaya, Selangor, Malaysia' (highlighted in green) and 'Unit No 601C, Level 6, Tower C, Uptown 5, 5, Jalan SS21/39, Damansara Uptown, 47400 Petaling Jaya, Kuala Lumpur'. At the bottom are three buttons: 'New', 'Modify', and 'Close'.

### Template

This field contains the default address template, which is displayed upon entry to the form. To override the default address template enter a valid template number or press the popup button to select from the valid list of templates. The Template Description displays for the selected Template

### Address Prefix Fields

These fields include fields such as Property Name, Flat/Unit No./Building and Forwarding. An Address Prefix may be entered in these fields as part of your search profile. The Prefix headings which display on this form are determined by the setup of the Address Template within Name and Address Parameters. These fields are case insensitive. Wildcard searching is available.

**Identifier**

If you are entering a search profile to identity an existing address, enter an identifier in this field e.g. 23 (for house number 23). The Identifier will usually be an House Number or PO Box Number.

**Component Description**

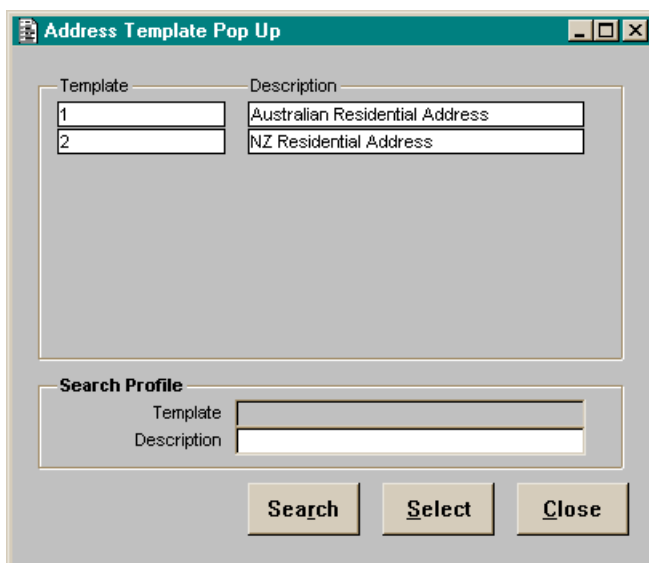
Each field displayed on the form is determined by the assigned template.

For example: Street, Suburb, State and Postcode are the available components by which you may retrieve information.

In each field enter (where known) the appropriate valid information or select the pop up button to display a list of valid component items for selection. Wild card searching is available.

**Address Template Pop Up**

The Address Template Pop Up enables the selection of a different Template. Once a different Template is selected all addresses new addresses will be formatted according to the new template details.

The image shows a screenshot of a software window titled "Address Template Pop Up". The window has a standard Windows-style title bar with minimize, maximize, and close buttons. Inside the window, there is a table with two columns: "Template" and "Description". The table contains two rows: the first row has "1" in the Template column and "Australian Residential Address" in the Description column; the second row has "2" in the Template column and "NZ Residential Address" in the Description column. Below the table, there is a section titled "Search Profile" which contains two input fields: "Template" and "Description". At the bottom of the window, there are three buttons: "Search", "Select", and "Close".

*Address Template Pop Up Form*

**Template**

The Template is the number or name given to the specific Templates created in the system.

**Description**

The Description is the detailed name given to the particular templates created.

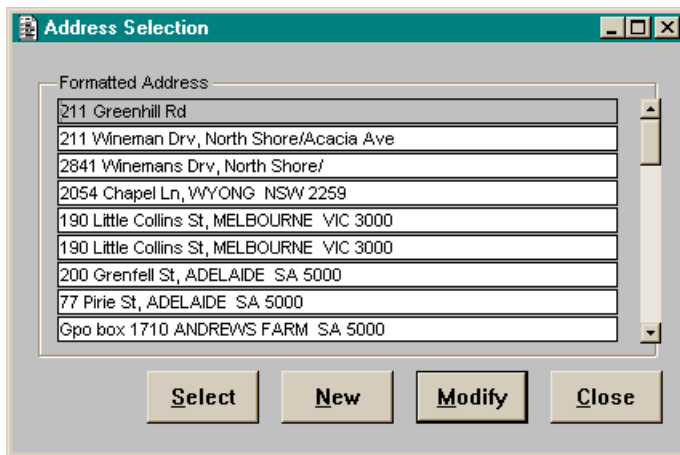
**Search Profile**

The Templates field enable a specific template code to be entered, to tailor the display of the Template details.

The Description field enables a specific description to be entered, to tailor the display.

**Address Selection Form**

This form will allow you to select an existing address record, create a new address record or modify an existing address record.



Formatted Address
211 Greenhill Rd
211 Wineman Drv, North Shore/Acacia Ave
2841 Winemans Drv, North Shore/
2054 Chapel Ln, WYONG NSW 2259
190 Little Collins St, MELBOURNE VIC 3000
190 Little Collins St, MELBOURNE VIC 3000
200 Grenfell St, ADELAIDE SA 5000
77 Pirie St, ADELAIDE SA 5000
Gpo box 1710 ANDREWS FARM SA 5000

Select New Modify Close

*Address Selection Form*

### Formatted Address

This field displays the formatted address of those records matching the retrieve profile. Addresses display in reverse component order i.e. Postcode, State, Suburb etc.

## Address Maintenance Form

This form will allow you to create a new address record or to maintain an existing address record. An address can be used as a Default Mailing Address and/or an Application Role Address by more than one name.

If an address is modified it can affect more than one individual or company.

Upon entry to the Address Maintenance form a status message (at the bottom of the screen) is displayed to indicate that the address is used for multiple purposes and instructs the user to press the Usage Enquiry button to identify the names that will be affected by the address modification.

Automatic case conversion is only performed when an Address Prefix or Identifier field is first entered (according to the case conversion rules set up in the Address Template within Parameters), rather than whenever the content is modified.

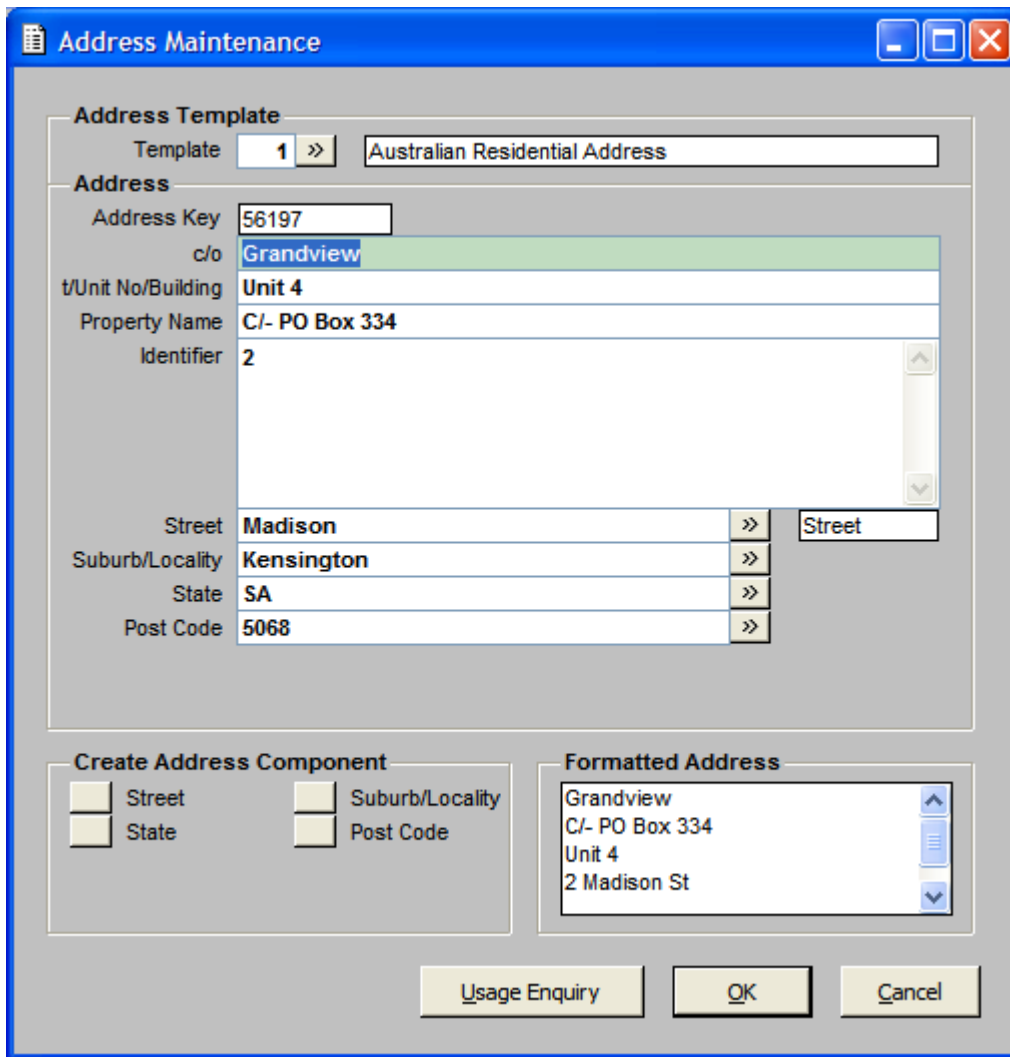
For example:

If the case conversion rule for the Address Identifier specifies "Capitalisation" and an initial value of "1A" is entered then the automatic case conversion will modify the value to "1a". The user can subsequently override the case conversion and reset the value to "1A".

To create a new address, the 'New' button needs to be selected from the Address Search Profile form. The Address Maintenance form will then display with the default Address Template displayed in the Template field.

To create a new address using the 'Free Format Address' template, the Address Template field Pop Up button needs to be selected to switch between the default 'Structured Address' template and the 'Free Format Address' template. In this case, the modified form, shown below, will display. This form allows 5 lines of free format text to be entered in the Address field.





The screenshot shows a software window titled "Address Maintenance". It contains several input fields and sections for managing address data.

**Address Template**

Template: 1 >> Australian Residential Address

**Address**

Address Key: 56197

c/o: Grandview

t/Unit No/Building: Unit 4

Property Name: C/- PO Box 334

Identifier: 2

Street: Madison >> Street

Suburb/Locality: Kensington >>

State: SA >>

Post Code: 5068 >>

**Create Address Component**

☐ Street ☐ Suburb/Locality

☐ State ☐ Post Code

**Formatted Address**

Grandview  
C/- PO Box 334  
Unit 4  
2 Madison St

Usage Enquiry OK Cancel

*Address Maintenance Form for Structured Addresses*

*Address Maintenance form for 'Free Format' Addresses*

## Template

The default address template is displayed on entry to the form. To override the default address template enter a valid template number or press the pop up button to select from the valid list of templates.

## Identifier

This field is the address identifier. This is usually a house number or a PO Box number.

## Component Description

Each field displayed on the form is determined by the assigned template. In the example given Street, Suburb, State and Postcode are the available components for the current address template.

In each field enter the appropriate information or select the pop up button to display a list of valid component items for selection.

## Component Qualifier

This field displays a qualifier (e.g. street, avenue etc) for the street component. If a street name and qualifier already exist, the qualifier is defaulted into this field as you tab through. If more than one street by that name exists, a selection form displays for you to select the desired street and qualifier. If only one street by that name exists but with a different qualifier, the existing qualifier will default into the field. Selecting the Street button in the Create Address Component section of the form will allow a new qualifier to be entered (via the Component Maintenance Form).

## Creating Components

If data is entered into a component line and it does not already exist against that component then the system will prompt you as to whether you wish to create that component. You may select Yes to create the component detail or No to cancel.

As you tab through the list of components, the system searches for existing components and links. If you wish to enter a different component from the one defaulted into the field, you can select the appropriate component button in the Create Address Component section of the form and enter a suitable component.

## Relating Components

As you enter data, the system checks to see if the component entered is related to another component. If it is only related to one component and you tab through the fields then the data will automatically be loaded for you.

For example, if Suburb is related to Street and a relationship has been established between Greenhill Road and Eastwood then by tabbing through the Suburb field the line will automatically be defaulted to Eastwood.

If Greenhill Road is related to Eastwood and Dulwich, when you tab through the suburb component you will be prompted to select the appropriate suburb.



If you Cancel from this list, you will be given the option to see ALL components.

#### Validation of New Components

A flag found in Names and Address Security Maintenance, Default Authority called 'Display New Component Confirmation Msg' allows for the validation of address components to be toggled on/off.

When the flag is set off then the system will automatically create new streets, suburbs and relationships etc without prompting the user. Toggling this function off may speed the data entry process but it also disables data checking

#### Creating Relationships

If you decide that you wish to enter a suburb to which Greenhill Road is not related then you will be asked whether you want the system to automatically create that relationship.

#### **Address Prefix**

These fields allow a prefix to be included in the formatted address. These fields are optional and can be defined in the Address Template Parameters.

#### **Create Address Component - Street**

Selecting this button displays a Component Maintenance form which allows the user to enter a new street component name and new qualifier (e.g. avenue) which will override the details in the address fields.

#### **Create Address Component - Suburb**

Selecting this button displays a Component Maintenance form which allows the user to enter a new suburb component name which will override the details in the address fields.

#### **Create Address Component - State**

Selecting this button displays a Component Maintenance form which allows the user to enter a new state component name which will override the details in the address fields.

#### **Create Address Component – Post Code**

Selecting this button displays a Component Maintenance form which allows the user to enter a new postcode component name which will override the details in the address fields.

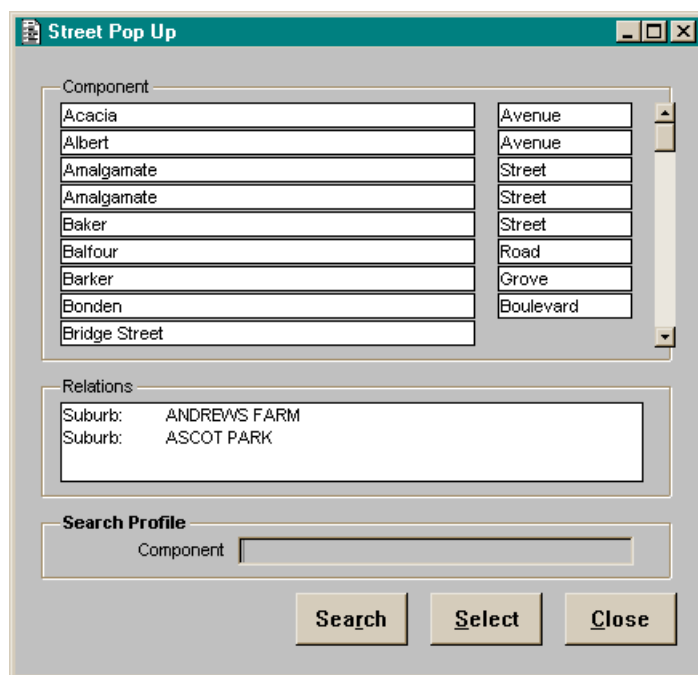
#### **Formatted Address**

The Formatted Address field displays details of the Formatted Address. The contents of the Formatted Address will change as the user leaves each modified Address field.

#### **Usage Enquiry Button**

Selecting this button will display the Address Usage Enquiry Form which displays details of usage of a formatted address.

### **Component Pop Up Form**



**Street Pop Up**

Component

Acacia	Avenue
Albert	Avenue
Amalgamate	Street
Amalgamate	Street
Baker	Street
Balfour	Road
Barker	Grove
Bonden	Boulevard
Bridge Street	

Relations

Suburb: ANDREWS FARM  
Suburb: ASCOT PARK

**Search Profile**

Component

**Search** **Select** **Close**

*Component Pop Up Form*

### Component

The Component field displays the relevant entries that can be selected. For example if Street Component are selected then all streets available would be listed.

### Relations

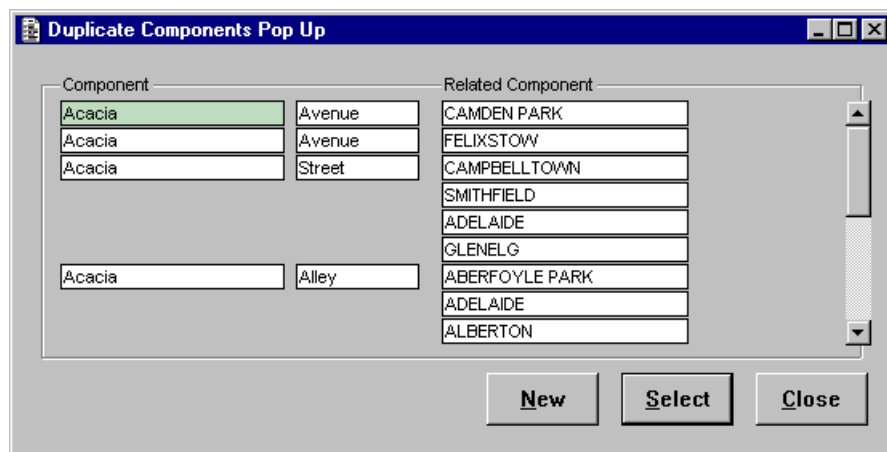
The Relations box shows other links for the particular Component Selected. For example if you had streets selected, then any suburbs that are linked to that particular address will be displayed.

### Search Profile

The Search Profile is used to narrow down the search criteria on a particular component. Enter a particular component and then click on the search button. This field is case insensitive. Wildcard searching is available, e.g. 5T\*

## Duplicate Components Pop Up Form

When linking a Component which has different Qualifiers (E.g. Florence Street and Florence Avenue), this form displays a list of the existing Components and their current links to enable the correct component to be selected.



**Duplicate Components Pop Up**

Component

Acacia	Avenue
Acacia	Avenue
Acacia	Street
Acacia	Alley

Related Component

CAMDEN PARK
FELIXSTOW
CAMPBELLTOWN
SMITHFIELD
ADELAIDE
GLENELG
ABERFOYLE PARK
ADELAIDE
ALBERTON

**New** **Select** **Close**

*Duplicate Components Pop Up Form***Component**

This field contains a list of the Components and their related qualifiers. A Component may be selected from this list to add to the Address being created.

**Related Component**

This field contains the related Components for each listed Component.

For example

If Streets are listed and Streets are linked to Suburbs, the Suburb(s) related to each of the listed Streets will display. This will enable the correct Street to be determined more easily.

**Component Maintenance Form**

This form allows new component details to be entered which will default into the Address details of the Address Maintenance form.

Component	Qualifier
Abbott	Street
Aberdare	Avenue
Aberfeldy	Avenue
Acacia	Avenue
Acacia	Road
Ackland	Avenue
Ackland Hill	Road
Acorn	Road
Ada	Street

*Component Maintenance Form*

**Component Type**

This field displays the type of component to be modified, e.g. street, suburb etc. This field is display only and cannot be maintained.

**Component**

This field allows the user to enter a new component name which will default into the component name field of the address details.

**Qualifier**

This field allows the user to enter a new qualifier (e.g. Avenue, Crescent) which will default into the Qualifier field of the address details.

**Address Usage Enquiry Form**

This form displays details of current usage of an address. It can be accessed via the Address Maintenance menu option or the new (as of Release 3.06) Address Enquiry menu option.

This new Menu option has been introduced for both Smart and Thick Client:

Name and Address Register >> Address Enquiry

The standard Address Search profile form is presented as per Address Maintenance, except there is no option to add New addresses when invoked via this option and selecting "Display" will invoke the Address Usage Enquiry directly.

**Address Usage Enquiry**

**Formatted Address**  
3 Madison St  
Kensington SA 5068

**Name Details**  
Default Address for Personal Name  
Mr J Law  
Communication Details  
Information Details  
Application Information Details

**Default Mailing Address Usage**

Mr J Law	Active Person Name	Current as of 28-Oct-2005
Ms A Banderas	Active Person Name	Current as of 28-Oct-2005
Mr F Astaire	Active Person Name	Current as of 31-Oct-2005

**Application Mailing Address Usage**

Formatted Name	Mr J Law	(Deactivated) Role Address
Affected Person	Booking: 182 - Booking Class: Functions Booking Class (Debtors - ov)	Current as of 06-Mar-2006
Formatted Name	Mr J Law	Current as of 28-Nov-2010
Customer	3460 - General Complaint - 24-Oct-2005 09:45:38 - Actioned	Current as of 28-Oct-2005
Formatted Name	Mr Jude Law	Current as of 28-Nov-2010
Document Issued	Basic letter - Draft Watermark ON (607/1BOTH)	Current as of 05-Aug-2010

Close

#### Address Usage Enquiry Form

The Address Usage Enquiry has also been enhanced to show any Address Usage which has been superseded. Previously the Date Effective only showed the date the Address was first used for the Default Mailing or Application Mailing Address, but now it will also show if the Address has been superseded.

For Example:

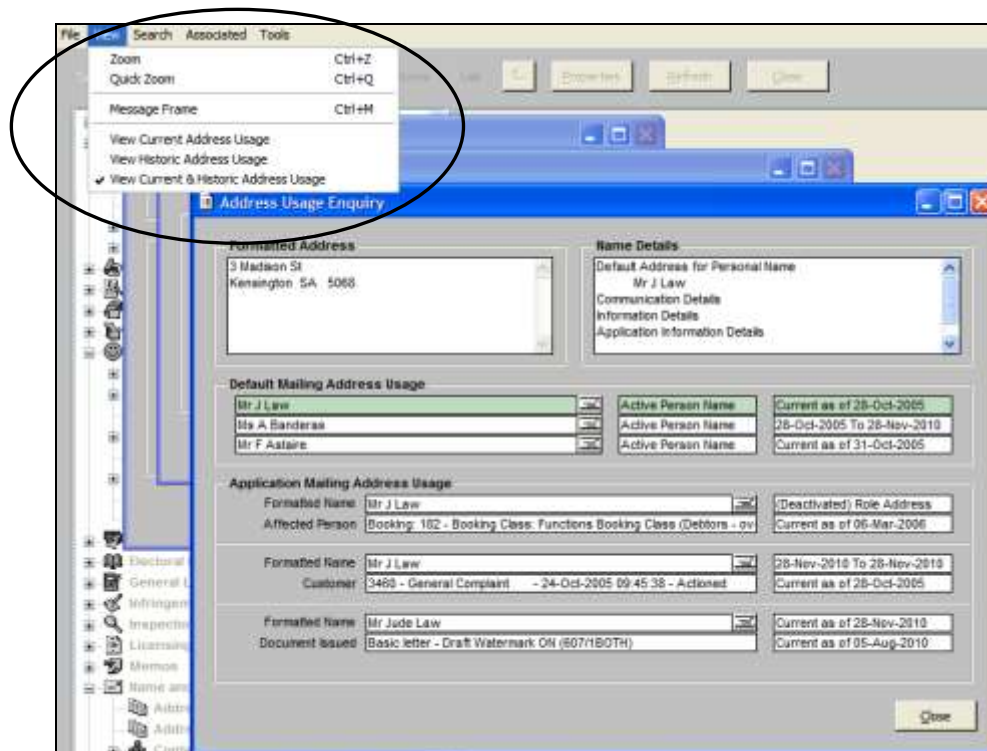
If the company "Old School Ltd" was at Address "1 Hard Drive" from 1-Aug-2000 but then tenancy changed and they moved to an alternate address on 7-Oct-2009 and "New Ideas Inc" became the new tenant, then previously the enquiry simply showed "Old School Ltd" had an Effective Date of 1-Aug-2000 and "New Ideas Inc" had an Effective Date of 7-Oct-2009. ie. There was no indication on the form that "Old School Ltd" has actually relocated as opposed to being a dual tenant.

The enquiry has now been enhanced to show when an Address is no longer used by an Identity or Role. So in the above example, "Old School Ltd" will now show the Date Effective field as "1-Aug-2000 To 6-Oct-2009" and "New Ideas Inc" will still show as "Current as of 7-Oct-2009".

Similarly, if the associated Role is made historic or is no longer active for an Application Role, the Date Effective will show as "(Historic) dd-mmm-yyyy" or "(Deactivated) dd-mmm-yyyy" respectively.

Note that the Date Effective field displays dates associated with the Address Usage only. These should not be confused with the dates associated with the Application Role which is shown separately on the form.

To aid in distinguishing Current Address Usage from Historic Address Usage, filtering has also been introduced to the form which defaults to displaying both. To filter to display Current and/or Historic grid filters have been introduced for the Smart Client and filtering options have been placed on the View pulldown in the Thick Client.



*Filters in the thick client*

### Formatted Address

This field displays the formatted address details. This field is display only and cannot be maintained.

### Name Details

This field displays Communication, Information and other details of the user which is currently highlighted in the Default Mailing Address Usage fields.

### Default Mailing Address Usage

These fields display details of the current users of the address. Details displayed are name, name type - Person or Company (whether it is active or inactive) and the date at which the name became effective.

### Application Mailing Address Usage - Formatted Name

Name details of the Person or Company relating to the Application Mailing Address. An 'envelope' button is available next to the Formatted Name fields. When the button is pressed the Mailing Address Enquiry form is displayed. The form displays the Mailing Address and potentially the Concatenated Mailing Address if the Role is shared by other Names (see end of document for equivalent Smart Client image initiated from Application Name Roles).

### Effective Date

The date the new default Mailing Address was attached to the Application Name record

### Application Mailing Address Usage

The address the Application/Role relates to.

### Application Role Date

Displays the current or historic date of the application role.



## Default Address Maintenance

This section will allow you to maintain a default address and to nominate a default mailing address per application. You may also view application specific address details.

A pull down menu option is available to limit the Role linkages displayed. This option is available from the View Menu at the top of the screen. The options available for selection are:

View Current and Historic Roles  
View Current Roles  
View Historic Roles

The default option will display Current Roles.

### Default Address Maintenance Form

This form is accessed via the Address button on the Personal Name Maintenance Form. It enables the addition and modification of default and mailing addresses. To create a new default address effective as of a nominated date, select the Insert button.

#### Overriding Mailing Address

A name is considered to have an overriding Mailing Address if the Mailing Address for one or more Application Mailing Addresses is not set to (default).



e.g. All correspondence to “Miss M J Atkins” in regards to the ownership of “7 Farmer Drive, ADELAIDE SA 5000” is addressed to an overriding Mailing Address of “151 Farmer Drv, ADELAIDE SA 5000” rather than the default address of “8 Hindmarsh Rd, HENLEY BEACH SOUTH SA 5022”.

Where the name has been linked to other applications, the application Name and Address details may be maintained as follows:

- The address may be changed from the default, using the detail button alongside the address to add or select an application mailing address
- Deletion of the Application Role address will return the address to the current default
- An agent/forwarding address can be assigned in the same way i.e. by using the detail button alongside the address and assigning another (e.g. agent) address for this particular role
- Any previously defined overriding Mailing Name or Address may be selected when creating an application role for an existing name. (see further details in the sections dealing with (Overriding Mailing Name and Address Selection), (Mailing Name and Mailing Address Maintenance) and (Deactivation of Mailing Address Overrides).

**Default Address Maintenance**

**Name Details**

Formatted Name: INFOR

**Default and Alternate Address Details as at Date Effective (Current and Historic Address View)**

Date Effective	Address
01-Jan-1995 (default)	208 Greenhill Rd, Eastwood SA 5063
13-Dec-2010	Alpharetta 13560 Morris Road, Suite 4100, Alpharetta, GA 30004

**Application Name and Address Details (Current Role View)**

**Customer** Booking: 1040 - Booking Class: Bookings by Council (Cash - over) Current as of 18-Nov-2008

**Name / Contact** INFOR (No Contact)

**Address** (Auckland) Date Effective 09-Dec-2010

**Contact** Booking: 1086 - Booking Class: Cash Bookings Class (Cash - no) Current as of 20-Jul-2009

**Name / Contact** INFOR (default) - (none)

**Address** (default)

**Customer** 8161 - EC1 (with Inspections) - 26-May-2009 09:01:33 - Acti Current as of 26-May-2009

**Name / Contact** INFOR (No Contact)

**Address** (Melbourne) Date Effective 10-Dec-2010

**Search Profile**

Role Type: [ ] [ ] >> [ ]

Clipboard Clipboard

Search Insert OK Cancel

Default Address Maintenance Form

The Thick Client Default Address Maintenance form now (as of Release 3.06) has a button after each address field. The icon on the button represents an envelope Mailing Address. The button is dimmed for Application Addresses if there is no overriding Contact or Address details for that role (as shown on the 2<sup>nd</sup> and 3<sup>rd</sup> Applicant entries above), but the button will still show the resulting Mailing Addressed when pressed.

#### Historic and Current Addresses

□ When viewing Roles or Addresses for any Name record, the ability exists to select the view required, Historic, Current (default) or the Historic and Current. These views can be invoked via the VIEW option from the menu pull down and provide the ability to see the 'view' that has been invoked on the Frame label for both Role and Address.

e.g.: By selecting the View of 'Current and Historic', both current and historic role or address records will be displayed and 'Current and Historic' will be displayed in the heading.

Role information will display in descending creation date sequence for each Role Type.

The screenshot shows the 'View' menu with the following options: Zoom (Ctrl+Z), Quick Zoom (Ctrl+Q), Message Frame (Ctrl+M), View Current Default Addresses, View Current & Historic Default Addresses (checked), View Current Roles (checked), View Historic Roles, View Current & Historic Roles, and View Roles with Mailing Overrides. The main window displays 'Default and Alternate Address Details as at Date Effective (Current and Historic Address View)' with a table of addresses. Below this is 'Application Name and Address Details (Current Role View)' showing customer and contact information for three different roles. At the bottom is a 'Search Profile' section with a 'Role Type' dropdown and a search button.

Default and Alternate Address Details as at Date Effective (Current and Historic Address View)			
27-Sep-2009	(default)	Level 1 Suite 4, 8 Greenhill Rd, Wayville SA 5034	
08-Jan-2001	(default)	27 Greenhill Rd, Wayville SA 5034	

Application Name and Address Details (Current Role View)			
Customer	Booking: 1040 - Booking Class: Bookings by Council (Cash - over)		Current as of 18-Nov-2008
Name / Contact	INFOR		(No Contact)
Address	(Auckland)		Date Effective 09-Dec-2010
Contact	Booking: 1086 - Booking Class: Cash Bookings Class (Cash - no		Current as of 20-Jul-2009
Name / Contact	INFOR		(default) - (none)
Address	(default)		
Customer	8161 - EC1 (with Inspections) - 26-May-2009 09:01:33 - Acti		Current as of 26-May-2009
Name / Contact	INFOR		(No Contact)
Address	(Melbourne)		Date Effective 10-Dec-2010

Search Profile

Role Type

☐ Clipboard ☐ Clipboard

View Menu Role Display Options

### Formatted Name

This field displays the formatted current name record. This field is non maintainable. The Formatted Name is based on the System Parameter formatting specified.

### Date Effective

This field contains the date that the default mailing address became effective. New addresses will Default to the current date, or the current date +1 if a record with the current date already exists. This Date can be maintained if required and must be set the current days date or later.

### Formatted Address

This field contains the formatted address that was the default address as at the effective date.

### Alternate Address

As of Release 3.06 there is a new 'alternate Address' column (Authorised Function). When a new Default Address is inserted into the grid it will be allocated a value of (default) indicating that it is a default address for the name. If required the "Alternate Address" column value can be changed to a meaningful description to represent the Alternate Address. This action will change this address to be an 'Alternate Address' and it will subsequently be moved to a position lower down in the grid (regardless of its creation date).

Note that the "Alternate Address" column value of the last remaining Alternate Address with that value cannot be modified once it has been reference by a Role. (A message will display alerting the user to this restriction), i.e:

The Alternate Address column value can be changed for other unused addresses as they have not been assigned as a Role override address. The one and only “Auckland” alternate address cannot be changed or deleted as “Auckland” has been assigned as a Role override address on the Booking Customer role (for example).

A Name may have multiple (default) addresses and multiple “alternate” addresses as the Date Effective determines which address currently applies. Addressing changes over time may result in a substantial number of rows in the Default Address grid. A filter is available on the grid to restrict the view to Current and/or Historic Default and Alternate addresses.

Note: The Alternate Address functionality is controlled by a new Authorised Function. If the “Alternate Address” function is not authorised then the Name and Address system will continue to operate as per the current functionality. If the “Alternate Address” function is not Authorised then the only visible change is a new column on the Thick Client “Default Address” form. However, the column will not be maintainable and always display a value of (default).

#### **Formatted Address Detail Button**

By pressing this button, you will access the “Address Maintenance form”. If any changes are made then they will be reflected in the default mailing address. The Date Effective field will not be changed.

#### **Application Name and Address Details - Role Information**

This field displays the description of the role type attached to the current name record.  
e.g. Document Issued details, Owner role details, Occupier role details.

The Application Role details will be bolded to indicate which Role Record is attached to the current Name record.

#### **Application Name and Address Details - Role Status Date**

The date displayed shows whether the role information is current or historic e.g. Current Date is displayed as ‘Current as of 22-Dec-1998’ or Historic Date is displayed as ‘18-Jan-1999 To 22-Jan-1999’

#### **Application Name and Address Details - Role Status Detail Button**

By pressing this button, you will access the appropriate application depending on the role type. e.g. selecting this button against an Owner Application Role Type will take you to Title Maintenance/Enquiry form.

If the Application Role Type is of Document Issued then you will be presented with the Document Request Maintenance/Enquiry form.

#### **Application Name and Address Details - Name**

This field displays the formatted name attached to the Role type displayed on the line above.

#### **Application Name and Address Details - Name Detail Button**

By selecting this button, you will access the “Application Mailing Name Maintenance/Enquiry” form.

#### **Application Name and Address Details - Address**

This field displays the formatted mailing address as attached to the Role type displayed on the line above.

If the word (default) appears in this line then the default address is used for this application role type. If the role record belongs to an election (e.g. Owner Vote) the address field may contain the actual address even though it is the same as the default address. This prevents any changes to the role record address in the case of the default address changing.

If an address is displayed then for this application role type the displayed mailing address is used. The adjacent field shows the date on which the mailing address became effective.

An Alternate Address assigned as a Role address override is displayed within parentheses e.g. (Auckland), while the adjacent ‘Mailing Address’ button displays the actual address that the ‘Alternate Address’ currently represents, e.g. Level 4, 93 Grafton Road, Auckland, New Zealand.

An ‘Alternate Address’ can be assigned or copied as an override address on a role. See the section on [Assigning an Alternate Address to a Role](#) for more details.

**Application Name and Address Details - Address Detail Button**

By selecting this button, you will access the "Application Mailing Address Maintenance" form to allow maintenance of the mailing address.

**Drag and Drop Icons**

The Drag and Drop Icons, which are adjacent to each Default Address, Mailing Name Override and Mailing Address Override line, enable new Names and Addresses to be created by 'dragging' any icon and dropping it onto another icon. For further details on how to use the Drag and Drop icons, please refer to the section on [Mailing Name and Mailing Address Maintenance](#).

**Search Profile - Role Type**

This field enables a specific Role Type code (e.g. LPA 1) or Application code (e.g. LPA) to be entered, to tailor the display of the Application Name and Address details.

The pop-up button may be used to select available Role Type codes.

**Drag and Drop Clipboard**

There are two Clipboard icons located at the bottom left of the form which allow for a temporary storage area for Mailing Names and Addresses to facilitate 'drag and drop' across more than one name.

For Example:

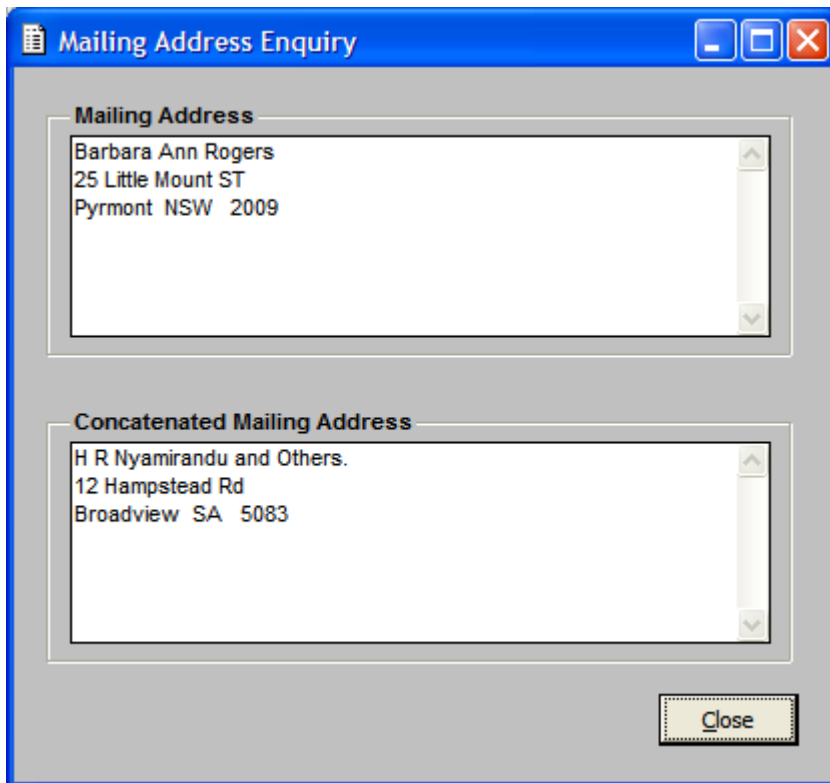
If both Fred and Wilma Flintstone change their mailing address then it is possible to manually modify Fred Flintstones default address and "drag" the new address onto one of the "Clip Board" icons.

When the address details for Wilma Flintstone are displayed, Fred Flintstones new mailing address will still be available within the "Clip Board" icon and it's a simple matter of "dragging" the "Clip Board" icon onto Wilma's default address area frame icon.

The "Clip Board" icons also need to be utilised when performing a "Drag and Drop" operation and the scroll bar or search profile needs to be used to locate the "drop target".

**Mailing Address Enquiry**

When the 'envelope' button is pressed on the Default Address Maintenance form in the Thick Client the above Mailing Address Enquiry form is displayed. The form displays the Mailing Address and potentially the Concatenated Mailing Address if the Role is shared by other Names.

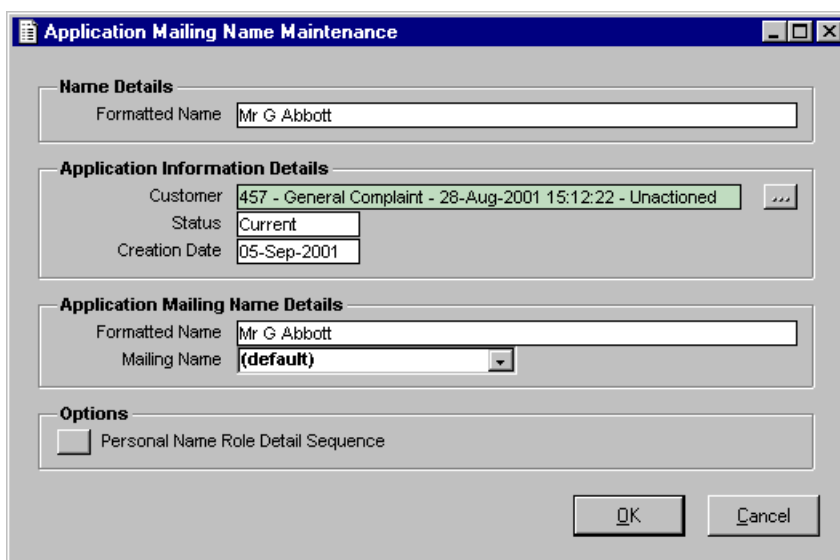


The 'Mailing Address Enquiry' dialog box features a blue title bar with standard window controls. It contains two text areas: 'Mailing Address' with the text 'Barbara Ann Rogers', '25 Little Mount ST', and 'Pyrmont NSW 2009'; and 'Concatenated Mailing Address' with the text 'H R Nyamirandu and Others.', '12 Hampstead Rd', and 'Broadview SA 5083'. A 'Close' button is located at the bottom right.

*Mailing Address Enquiry*

## Application Mailing Name Maintenance

This option allows you to detail out to the particular Application in which the name was entered and make any changes required.



The 'Application Mailing Name Maintenance' dialog box has a blue title bar. It is divided into four sections: 'Name Details' with a 'Formatted Name' field containing 'Mr G Abbott'; 'Application Information Details' with fields for 'Customer' (457 - General Complaint - 28-Aug-2001 15:12:22 - Unactioned), 'Status' (Current), and 'Creation Date' (05-Sep-2001); 'Application Mailing Name Details' with 'Formatted Name' (Mr G Abbott) and a 'Mailing Name' dropdown menu set to '(default)'; and 'Options' with an unchecked checkbox for 'Personal Name Role Detail Sequence'. 'OK' and 'Cancel' buttons are at the bottom right.

*Application Mailing Name Maintenance Form (for Person)*

*Application Mailing Name Maintenance Form (for Company)*

### Overriding Mailing Name

A name is considered to have an overriding Mailing Name if the Mailing Format for one or more Application Mailing Names is not set to (default).

e.g. All correspondence to “Miss Marie Jane Atkins” in regards to the ownership of “7 Farmer Drive, ADELAIDE SA 5000” is addressed to an overriding Mailing Name of “Miss M J Atkins”.

### **Formatted Name**

This field displays the formatted Name details. This field is non maintainable.

### **Application Information Details - Role Information**

Application Information gives details of the Specific Role Type chosen. You are able to detail out to the Application and modify if necessary.

### **Application Information Details - Status**

This field displays the status of the application role e.g. current or historic

### **Historic Date**

This field displays the date the application role was made historic.

### **Creation Date**

This field displays the creation date of the application role.

### **Application Mailing Name Details**

The Application Mailing Name details shows the formatted name to be used, with the ability to change the formatting specifications. The six options are as follows:

- ☐ Given Name, Surname
- ☐ Title, Given Name, Surname
- ☐ Initials, Surname
- ☐ Title, Initials, Surname
- ☐ (default)
- ☐ No Automatic Formatting.

### **Preferred Delivery Method**

This form has been modified to show the new *Preferred Delivery Method* drop-down field when a site is authorised to the *Electronic Document Delivery* function. It will have four possible values, *(default)*, *Post*, *E-mail* and *Fax*, and will allow the *Preferred Delivery Method* value specified against a particular name to be overridden on a role-by-role basis. Whenever a document is generated and printed against a name in a particular role, the override value (if any) in the role's *Preferred Delivery Method* field will apply, unless that value itself has been overridden. A white background for the field's text will indicate an overridden value, while a gray background, as elsewhere in Pathway, will indicate that a default value applies, in this case the value from the name record. Whenever *(default)* is selected from the drop-down, it will immediately be

replaced with the actual default (*Post*, *E-mail* or *Fax*) on a gray background. A warning message will be displayed if *Fax* is the default or override value and no fax details have been specified in Mail and Fax Server Maintenance.

### Options – Personal/Company Name Role Detail Sequence Button

Selection of this button will display the Personal/Company Name Role Detail Sequence Maintenance Form which allows the sequence of Communication and Information Types to be changed. The option label will become bolded when a sequence has been modified.

## Personal Name Role Detail Sequence Maintenance Form

This form allows the sequence of Communication and Information Types to be changed for a particular person.

*Personal Name Role Detail Sequence Maintenance Form*

### Formatted Name

This field displays the formatted Name details. This field is non maintainable.

### Application Information Details

Application Information gives details of the Specific Role Type. You are able to detail out to the Application and modify if necessary.

The Status field displays the status of the application role e.g. current or historic

The Creation Date field displays the creation date of the application role.

### Communication Details

These fields display the Communication Types for the person being maintained. The frame label will indicate whether the sequence is the default sequence or whether the sequence has been changed. The Move Buttons may be used to modify the sequence. Alternatively, menu options are available from the Edit menu to restore the default sequence.

### Information Details

These fields display the Information Types for the person being maintained. The frame label will indicate whether the sequence is the default sequence or whether the sequence has been changed. The Move



Buttons may be used to modify the sequence. Alternatively, menu options are available from the Edit menu to restore the default sequence.

### Move Buttons

The Move Buttons may be used to change the sequence of Communication and Information Types for a particular person.

## Company Name Role Detail Sequence Maintenance Form

This form allows the sequence of Communication and Information Types to be changed for a particular Company.

**Company Name Role Detail Sequence Maintenance**

**Name Details**  
Formatted Name: All Food Services Pty Ltd

**Application Information Details**  
Customer: 459 - General Complaint - 28-Aug-2001 15:19:13 - Unactioned  
Status: Current  
Creation Date: 05-Sep-2001

**Communication Details (Default Sequence)**  
Business Phone: 8889999  
Business Fax: 8889998  
After Hours Phone: 83987654  
GP Number: 555

**Information Details (Default Sequence)**  
ACN: ACN 309876  
Licence No: 909878987  
Drivers Licence No: 12987654

Move buttons (up/down arrows) are located to the right of the Communication and Information sections.

OK Cancel

Company Name Role Detail Sequence Maintenance Form

### Formatted Name

This field displays the formatted Name details. This field is non maintainable.

### Application Information Details

Application Information gives details of the Specific Role Type. You are able to detail out to the Application and modify if necessary.

The Status field displays the status of the application role e.g. current or historic

The Creation Date field displays the creation date of the application role.

### Communication Details

These fields display the Communication Types for the company being maintained. The frame label will indicate whether the sequence is the default sequence or whether the sequence has been changed. The Move Buttons may be used to modify the sequence. Alternatively, menu options are available from the Edit menu to restore the default sequence.

### Information Details

These fields display the Information Types for the person being maintained. The frame label will indicate whether the sequence is the default sequence or whether the sequence has been changed. The Move Buttons may be used to modify the sequence. Alternatively, menu options are available from the Edit menu to restore the default sequence.



## Move Buttons

The Move Buttons may be used to change the sequence of Communication and Information Types for a particular company.

## Application Mailing Address Maintenance/Enquiry

A mailing address at an Application Role level enables all correspondence relating to that Application Role, (e.g. Property Owner) to be forwarded to an address other than the default address attached to the name. This form allows you to attach multiple addresses at an Application Role level.

If multiple addresses are attached to an Application Role, then the 'Date Effective' determines the address that is used for correspondence specifically related to the Application Role (e.g. Property Owner)

If the 'Property Owner' for example does not have an Application Role address (Address is shown as (default)), then the Address Search Profile form is automatically displayed. This enables the operator to select an existing address or create a new address for all correspondence related to the 'Property Owner'

A Mailing Address override can be deactivated from this form. The Active flag next to an address can be checked off to deactivate the overriding Mailing Address attached to the role.

Date Effective	Address	Active
17-Nov-2009	Grandpa St, Kensi SAAA	<input checked="" type="checkbox"/>

*Application Mailing Address Maintenance / Enquiry Form*

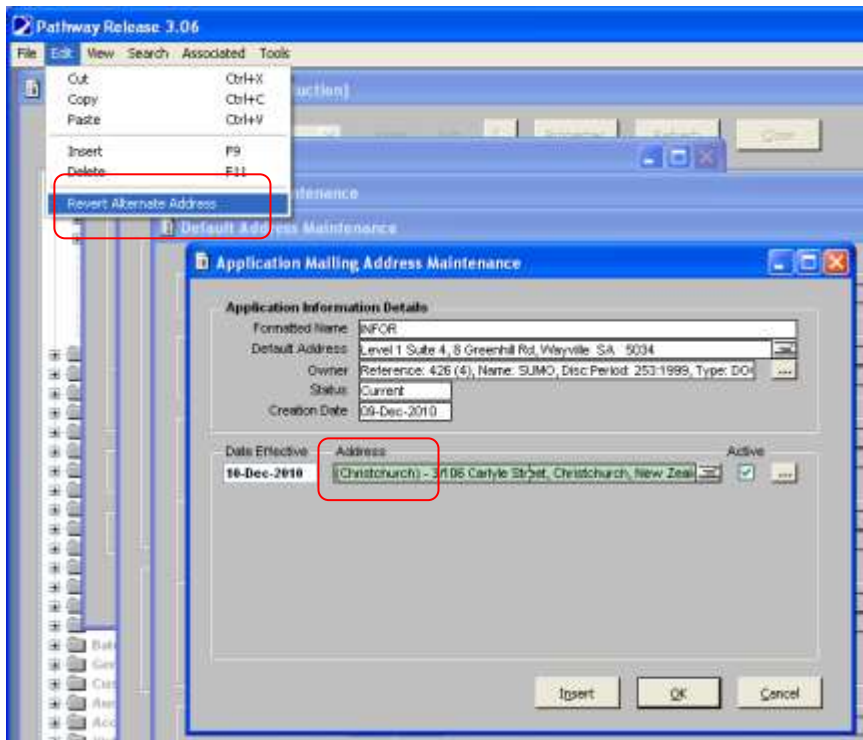
The [Edit/Revert Alternate Address] is a pull down menu option that is only visible when an "Alternate Address" has been assigned as a Role address override.

As an "Alternate Address" defined for the Name cannot be deleted once it has been assigned as a Role address override, the [Revert Alternate Address] pull down menu option can be used to remove this dependency. The Alternate Address becomes an Override address using the specific address that the 'Alternate Address' currently represents.

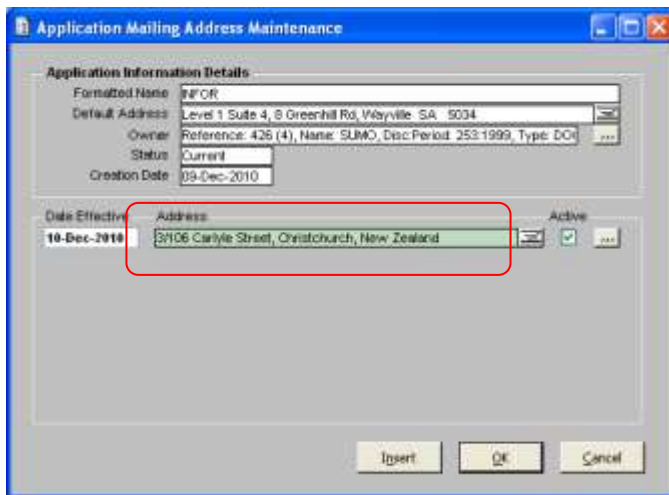
e.g:

If Infor was to close its Christchurch office then all Role address overrides that reference the "Christchurch" alternate address would need to be "Reverted" and "Deactivated". All future correspondence for these roles will be sent to Infor's (default) address while still retaining history of the deactivated Christchurch Role

address overrides. This will enable the “Christchurch” alternate address to be deleted preventing any further Role address override assignment to “Christchurch”.



The [Revert Alternate Address] pull down menu option can be used to change the Role address override from an “Alternate Address” to the specific address that the “Alternate Address” currently represents.



When a Role address override is reverted from an “Alternate Address” then the current address that the “Alternate Address” represents is assigned as a specific Role address override.

### Formatted Name and Default Address

These fields display the name and address for the Application Role. The ‘envelope’ button, when clicked, displays the Mailing Address Enquiry form showing the formatted name and address.

### Role Information

This field displays the description of the Role Type attached to the current name record. e.g. Property Owner role details, Document Issued details, Occupier role details. The Detail button allows the user to detail out to the Application Role.

**Status**

This field displays the status of the Application Role, which could be either Current or Historic.

**Historic Date**

This field displays the date the Application Role was made historic.

**Creation Date**

This field displays the date the Application Role was created.

**Date Effective**

If multiple addresses are attached to an Application Role then the 'Date Effective' determines the address that is used for correspondence related to the Application Role e.g. Property Owner. The Date Effective entered must be equal to or greater than the current days date.

**Formatted Address**

This field displays the address to which the correspondence will be sent. The 'envelope' button, when clicked, displays the Mailing Address Enquiry form showing the formatted name and address.

**Active Flag**

The Active flag next to an address can be checked off to deactivate the overriding Mailing Address attached to the role.

**Detail Button**

The detail button takes you to the Address Maintenance form.

## Overriding Mailing Name and Address Selection

When an existing name is selected for a new role and the name already has an overriding Mailing Name or Address defined on another application role then a new "Overriding Mailing Name and Address Pop Up" form is displayed.

The "Overriding Mailing Name and Address Pop Up" enables the user to optionally select one of the existing Mailing Name and Mailing Address overrides as an override for the newly created role. The Name and Address Security settings determines what "Overriding Mailing Name and Address Pop Up" are displayed.

If the user is not authorised to maintain "Application Addresses" or not authorised to "View Roles for a Name" then this form is not displayed.

For Example:

When "Fred Flintstone" is chosen via the [Select] button as a new "Occupier" the system checks for any pre existent Mailing Name and Address overrides on other roles associated with "Fred Flintstone".

If any pre existent overrides exist then the "Overriding Mailing Name and Address Pop Up" form is displayed.

**Occupier - Name Selection**

Name	Address	Active
Flintstone, Fred	123 Greenhill Rd, Parkside SA 5063	<input type="checkbox"/>
<b>Flintstone, Pebbles</b>	<b>1A/1234 Aardvark Alley, Eastwood SA 5168</b>	<input type="checkbox"/>
Flintstone, Vilma	1A/1234 Aardvark Alley, Eastwood SA 5180	<input type="checkbox"/>

**Name Details**

Specific Application Information Details  
 Communication Details  
 Information Details  
 Application Information Details  
     Current - Property Owner: 1A/1234 Aardvark Alley, EASTWOOD SA 5180

**Name Search Options**

Surname or Company: **FLINTSTONE**  
 Given Names:  
 Phonetic:  
 Address Qualifier:

**Select**

Name selection invokes the Overriding Mailing Name and Address Pop-Up.¶

Document Copy **Select** New Search Modify Quit

**Overriding Mailing Name and Address Pop Up**

**Name Details**

Formatted Name:

**Default Address Details as at Date Effective**

**Overriding Application Name and Address Details (Current and Historic Role View)**

Property Owner	Name	Address	Date Effective
1A/1234 Aardvark Alley, EASTMOOD SA, 5160	Mr F Flintstone	1A/1234 Aardvark Alley, Eastwood SA, 5160	28-Nov-2000

Search Profile

Role Type:

Search Select Quit

Indicates: a Mailing Name override

Indicates: a Mailing Address override

Only roles associated with “Fred Flintstone” with either a Mailing Name or Mailing Address override are displayed.

The **Select** button will assign an overriding Mailing Name and/or overriding Mailing Address to the newly created role.

A Detail button adjacent to the Mailing Name field is displayed if the role has an overriding Mailing Name. This Detail button is used to display more information on the Mailing Name override. Selecting this role will override the Mailing Name on the newly created role.

A Detail button adjacent to the Mailing Address field is displayed if the role has an overriding Mailing Address. This Detail button is used to display more information on the Mailing Address override. Selecting this role will override the Mailing Address on the newly created role.

A Detail button adjacent to the Mailing Name field and another adjacent to the Mailing Address field is displayed if the role has both an overriding Mailing Name and Address.  
Selecting this role will override the Mailing Name and Address on the newly created role.

When a Mailing Address override is copied to the newly created role only the current Mailing Address override is copied.

Deactivated Mailing Address overrides or overrides with an Effective Date later than the current date or earlier than the most recent Effective Date will not be applied to the new role.

The Close or Quit button will not assign an overriding Mailing Name or Address to the newly created role and therefore the default Mailing Name and Address will be used for all correspondence relating to the newly created role.

## Mailing Name and Mailing Address Maintenance.

The "Overriding Mailing Name and Address Pop Up" form is only displayed when an existing name is chosen via the [Select] button on the Name Selection form.

If an existing name is chosen via the [Modify] button on the Name Selection form then the appropriate Name Maintenance form is displayed.

A status line message will be displayed informing the user that overriding Mailing Names or Addresses exist on other roles associated with the name.

For Example: "Name or Address Overrides exist. Use the Address button to optionally copy an Override to the new Occupier."

This message indicates that the [Address] button can be used to copy an overriding name or address from an existing role to the newly created role.

The Name and Address Security Settings determine whether a Mailing Name or Address Override can be copied from roles attached to other applications.

(Prior to Release 2.10 the "Default Address Maintenance" form only allowed a new Default Mailing Address to be created from an overriding Mailing Address by pressing the "Pointing Finger" icon. In Release 2.10 the "Pointing Finger" icon has been replaced with new icons that enable "Drag and Drop".)

"Drag and Drop" is performed by a left mouse click on a "drag source" icon and moving the mouse pointer onto a "drop target" icon with the left mouse button still depressed. The attributes of the mouse pointer will indicate when a valid "drop target" has been located.

These icons are adjacent to each Default Address, Mailing Name Override and Mailing Address Override line.

The "drag and drop" icons enable:

- ☐ A new Default Mailing Address to be created by "dragging" any Mailing Address icon and "dropping" it on the Default Address area frame icon.
- ☐ A new Mailing Address Override to be created by "dragging" any Mailing Address icon and "dropping" it on the Mailing Address Override icon. This facility eliminates the need to use the "Address Search Profile" form to locate and attach an overriding Mailing Address to a role if another role already uses the address as an override.
- ☐ A new Mailing Name Override to be created by "dragging" any Mailing Name icon and "dropping" it on the Mailing Name Override icon. This facility eliminates the need to manually enter an overriding Mailing Name on a role if another role already has the name as an override.

The icon attributes indicate whether the icon can act as a drag source and/or a drop target.  
i.e.:

- ☐ A Frame around the icon indicates that the icon can be dropped onto.
- ☐ A Non Dimmed image indicates that the icon can be dragged.

<u>Icon Display Attributes</u>	<u>Drag Source</u>	<u>Drop Target</u>
Framed and Not Dimmed	Yes	Yes
Framed and Dimmed	No	Yes
Not Framed and Not Dimmed	Yes	No

Examples:

The screenshot shows a 'Default Address' form with several sections: 'Name Details', 'Application Name and Address Details (Current and Historic Role View)', and 'Search Profile'. Three callout boxes provide information about icons used in the form:

- (Not-Framed and Not-Dimmed)** Icon indicates a Drag-Source only.
- (Framed and Not-Dimmed)** Icon indicates a Drag-Source and a Drop-Target.
- (Framed and Dimmed)** Icon indicates a Drop-Target only.

The two "Clip Board" icons located at the bottom left of the form allow for a temporary storage area for Mailing Names and Addresses to facilitate "drag and drop" across more than one name.

For Example:

If both Fred and Wilma Flintstone change their mailing address then it is possible to manually modify Fred Flintstone's default address and "drag" the new address onto one of the "Clip Board" icons. When the address details for Wilma Flintstone are displayed, Fred Flintstone's new mailing address will still be available within the "Clip Board" icon and it is a simple matter of "dragging" the "Clip Board" icon onto Wilma's default address area frame icon.

The "Clip Board" icons also need to be utilised when performing a "Drag and Drop" operation and the scroll bar or search profile needs to be used to locate the "drop target".

## Deactivation of Mailing Address Overrides.

The Default Address Maintenance form allows multiple Mailing Address overrides to be attached to a single role.

Prior to Release 2.10 when all future correspondence needed to be addressed to an individual's "Default Address" regardless of the role then all overriding Mailing Addresses attached to each role needed to be deleted.

The major draw back of this approach was the time required to manually remove a large number of overriding Mailing Addresses and the subsequent loss of the overriding Mailing Address history.

Release 2.10 has provided an "Active" indicator on each Overriding Mailing Address to enable any or all Overriding Mailing Address overrides attached to a name to be deactivated.

Overriding Mailing Addresses can be deactivated by two distinct mechanisms.

### ❑ Default Mailing Address Form.

The first method to deactivate Mailing Address overrides is via the new [Edit] [Deactivate Role Addresses] pull down menu option.

This pull down menu option will deactivate all overriding Mailing Addresses attached to the name.

If the user does not have authority to maintain "Other Application Address" then only the overriding mailing addresses for the application currently being maintained can be deactivated.



For Example:

Upon selection of this pull down menu option a message will be displayed to confirm whether to deactivate Mailing Address overrides for the current application roles, for all application roles, or to cancel the deactivation.

A status message is placed into the message frame for each Mailing Address override that is deactivated.

For Example:

“Deactivated Property Owner Mailing Address Override:

'1A/1234 Aardvark Alley, Eastwood SA 5160'. Date Effective: '28-Nov-2000'.

Deactivated Occupier Mailing Address Override:

'1A/1234 Aardvark Alley, Eastwood SA 5160'. Date Effective: '29-Nov-2000'.

Deactivated 2 Application Role Mailing Address Overrides.

Any Application Roles that have a deactivated Mailing Address override are signified by (Deactivated) in the Application Role Address field.

For Example

❑ Role Address Maintenance Form.

The second method to deactivate Mailing Address overrides is via the Role Address Maintenance form.

This form is invoked via the [Detail] button adjacent to an overriding Mailing Address.

The Release 2.10 modification enables the user to selectively deactivate and reactivate overriding Mailing Address attached to the role.

As of Release 3.06, additional options have been made available to deactivate selected Role address overrides without the need to detail each Role.

The "Deactivate Role Addresses" pull down menu option will display a dialogue question to allow Role address overrides to be deactivated.

Upon the selection of the [Edit]-[Deactivate Role Addresses] pull down menu option a confirmation message is displayed to prevent unwanted deactivations by a user inadvertently selecting an option.





The [This Role] button will deactivate all overriding role addresses for the Role that currently has focus.

The [All Owner Roles] button will deactivate all overriding role addresses on current roles with the same Role Type that currently has focus.

The [All Animal Control Roles] button will deactivate all overriding role addresses on current roles with the same Role Application that currently has focus.

The [All Roles] button will deactivate all overriding role addresses on current roles regardless of Role Application and Type.

The [Cancel] button will cancel the deactivation process.

## Alternate Address

The Alternate Address functionality is basically identical in both the Smart Client and Thick Client. The Thick Client functionality has been included within this documentation to illustrate the differences between the user interfaces.

Name and Address Register >> Name and Address Maintenance >> [Name and Address Maintenance] option.

A Default Address grid has a new "Alternate Address" column.

The Default Address Maintenance form showing the new “Alternate Address” column in the Default Address grid and a Booking Customer role using the (Auckland) “Alternate Address” as an overriding address. An “Alternate Address” assigned as a Role address override is displayed within parentheses, eg: (Auckland), while the adjacent “Mailing Address” button the will displays the actual address that the “Alternate Address” currently represents, eg Level 4, 93 Grafton Road, Auckland, New Zealand.

Mailing Address form shows the actual address that the “Alternate Address” currently represents.

When a new Default Address is inserted into the grid it will be allocated a value of (default) indicating that it is a default address for the name.

If required the “Alternate Address” column value can be changed to a meaningful description to represent the Alternate Address.

Note that the “Alternate Address” column value of the last remaining Alternate Address with that value cannot be modified once it has been reference by a Role.

ie:

In the example screen above the Alternate Address column value can be changed for the “Christchurch”, “Melbourne” and “Sydney” addresses as they have not been assigned as a Role override address. The one and only “Auckland” alternate address cannot be changed or deleted as “Auckland” has been assigned as a Role override address on the Booking Customer role.



A Name may have multiple (default) addresses and multiple “alternate” addresses as the Date Effective determines which address currently applies.

Addressing changes over time may result in a substantial number of rows in the Default Address grid. A filter is available on the grid to restrict the view to Current and/or Historic Default and Alternate addresses.

le:

**Pathway Release 3.06**

File Edit View Search Associated Tools

Zoom Ctrl+Z  
Quick Zoom Ctrl+Q  
Message Frame Ctrl+M

☒ View Current Default Addresses  
☐ View Current & Historic Default Addresses  
☒ View Current Roles  
☐ View Historic Roles  
☐ View Current & Historic Roles  
☐ View Roles with Mailing Overrides

**Default and Alternate Address Details as at Date Effective (Current Address View)**

Date Effective	Address Type	Address Details
27-Sep-2009	(default)	Level 1 Suite 4, 8 Greenhill Rd, Wayville SA 5034
09-Dec-2002	Auckland	Level 4, 93 Grafton Road, Auckland, New Zealand

**Application Name and Address Details (Current Role View)**

Customer	Name / Contact	Address	Current as of
Booking: 1040 - Booking Class: Bookings by Council (Cash - over	INFOR	(Auckland)	18-Nov-2008
Booking: 1086 - Booking Class: Cash Bookings Class (Cash - no	INFOR	(default)	20-Jul-2009
8161 - EC1 (with Inspections) - 26-May-2009 09:01:33 - Acti	INFOR	(Melbourne)	26-May-2009

**Search Profile**

Role Type  >>

☐ Clipboard  
☐ Clipboard

Search Insert OK Cancel

*Default Address Maintenance form showing the Default Address grid filtered to only show current default and alternate addresses. The historic (default) addresses and historic “Melbourne” and “Sydney” alternate addresses have been filtered from the view.*

### Assigning an Alternate Address to a Role

An “Alternate Address” can be assigned as an override address on a role by positioning the cursor on the envelop icon adjacent to the “Alternate Address” within the Default Address grid and performing a drag/drop mouse operation onto the envelop icon on the appropriate Role.

Dropping the “Christchurch” Alternate Address onto an Animal Owner Role.

A question will be asked whether to assign or copy the “Alternate Address” to the Role or all current Roles with the same Role Type.

Eg:

The following dialogue question will be asked when dragging the “(Christchurch) – 3/106 Carlyle Street, Christchurch, New Zealand” alternate address and dropping it onto one of the Animal Owner roles.

Message displayed when an Alternate Address is dropped on an Animal Owner Role and the Name has more than one current Role for the Role Type.

If the Name has no other current Roles for the same Role Type as the target of the drop operation then the [Assign to All current ----- Roles] and [Copy to All current ----- Roles] response buttons will not be available.

Selecting [Cancel] will cancel the drag/drop operation.

Selecting [Assign to the Owner Role] will assign the Alternate Address as an override for the Role  
le:

If Infor relocates its Christchurch office and a new “Alternate Address” is created for “Christchurch” then this Role will automatically use the new address for all future correspondence.

Selecting [Assign to ALL current Owner Roles] will assign the Alternate Address as an override to the Role that was the target of the drop operation plus all other current Roles with the same Role Type.

Selecting [Copy to Owner Role] will copy the Alternate Address as an override for the Role  
le:

If INFOR relocates its Christchurch office and a new “Alternate Address” is created for “Christchurch” then this Role will continue to use the historic Christchurch address. This is equivalent to specifically selecting the “3/106 Carlyle Street, Christchurch, New Zealand” address as an override for the Role.

Selecting [Copy to ALL current Owner Roles] will copy the Alternate Address as an override to the Role that was the target of the drop operation plus all other current Roles with the same Role Type.

“Alternate Address” can also be assigned in the “Application Mailing Address” maintenance form accessed via the [...] button on the Role Address line.

The [...] button on the Role Address line allows the overriding Role addresses to be maintained.

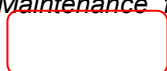
The form displayed upon the selection of the Role Address [...] button is dependent on whether Role address overrides are already present and/or “Alternate Addresses” have been defined on the Name.

1) If no Role address overrides are present and no “Alternate Addresses” have been defined on the Name then the “Address Search” form will be displayed.

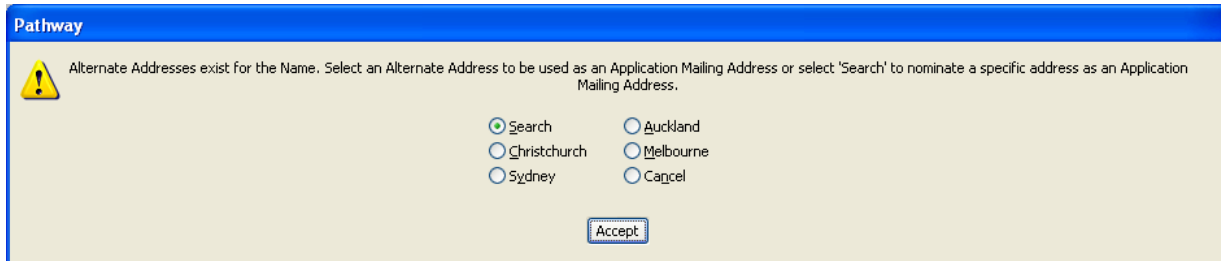
This enables an existing address to be selected or a new address to be created and assigned as an override for the Role as per the current functionality.

2) If no Role address overrides are present and “Alternate Addresses” have been defined on the Name then the following dialogue question will be displayed.

Dialogue question displayed when Alternate Address have been defined on the Name but no Role address overrides are present. Selecting the [Search] button will display the “Address Search” form. Selecting an [Alternate Address] button will create a Role address override. Selecting the [Cancel] button will return to the “Default Address Maintenance” form.



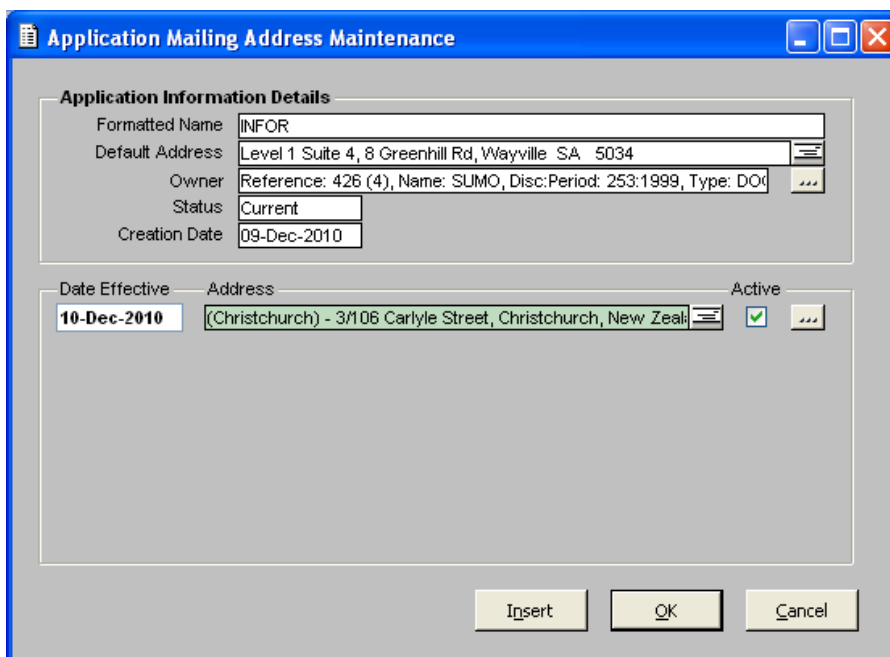
Note that if the number of “Alternate Address” defined on a Name exceeds three then the individual buttons will be replaced with a radio group and an [Accept] button. The functionality remains identical however the user needs to select the appropriate option to perform followed by the [Accept] button.



The dialog box titled "Pathway" has a yellow warning icon and the text: "Alternate Addresses exist for the Name. Select an Alternate Address to be used as an Application Mailing Address or select 'Search' to nominate a specific address as an Application Mailing Address." Below this text are five radio buttons arranged in two columns: "Search", "Christchurch", "Sydney", "Auckland", "Melbourne", and "Cancel". The "Search" button is selected. At the bottom center is an "Accept" button.

Dialogue question displayed when more than three Alternate Addresses have been defined on the Name but no Role address overrides are present.

3) If Role address overrides are already present then the “Application Mailing Address” form will be displayed.



The "Application Mailing Address Maintenance" form is divided into two main sections. The top section, "Application Information Details", contains fields for: Formatted Name (INFOR), Default Address (Level 1 Suite 4, 8 Greenhill Rd, Wayville SA 5034), Owner (Reference: 426 (4), Name: SUMO, Disc: Period: 253:1999, Type: DO), Status (Current), and Creation Date (09-Dec-2010). The bottom section contains a table with columns "Date Effective", "Address", and "Active". The first row shows "10-Dec-2010", "[Christchurch] - 3/106 Carlyle Street, Christchurch, New Zealand", and a checked "Active" box. At the bottom are "Insert", "OK", and "Cancel" buttons.

Application Mailing Address Maintenance form showing a Role address override based on the (Christchurch) “Alternate Address” that was created by selecting (Christchurch) from the “Alternate Addresses exist...” dialogue question.

If "Alternate Addresses" have been defined on the Name then the [Insert] button will display a dialogue question.

Dialogue question displayed when Alternate Addresses have been defined on the Name and the [Insert] button is selected from the "Application Mailing Address" form. Selecting the [Search] button will display the "Address Search" form. Selecting an [Alternate Address] button will create a Role address override.

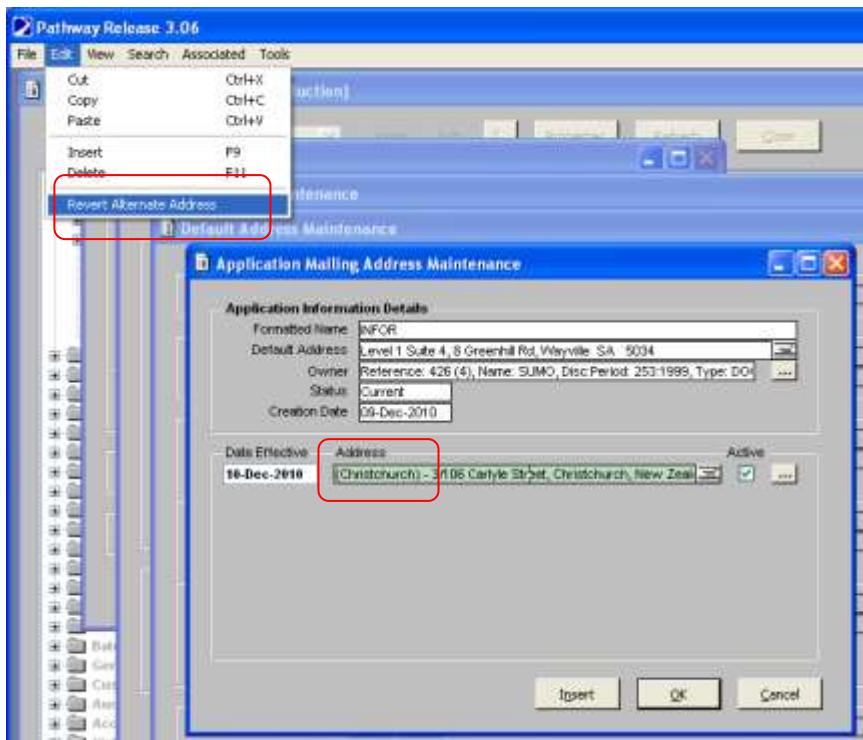
The [Edit]-[Delete] pull down menu option, or F11 function key, can be used to delete Role address overrides regardless of whether they are an assigned "Alternate Address" or a specifically selected address. Deactivation of Role address overrides is recommended over deletion to preserve addressing history.

The [Revert Alternate Address] is a pull down menu option that is only visible when an "Alternate Address" has been assigned as a Role address override.

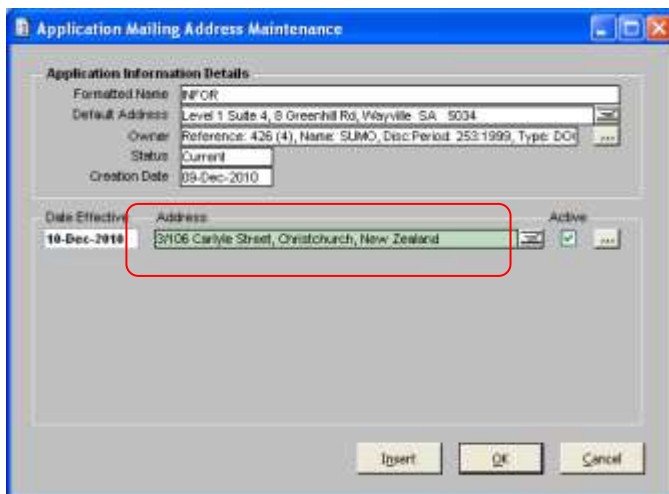
An "Alternate Address" defined for the Name cannot be deleted once it has been assigned as a Role address override. The [Revert Alternate Address] pull down menu option can be used to remove this dependency.

Eg:

If Infor was to close its Christchurch office then all Role address overrides that reference the "Christchurch" alternate address would need to be "Reverted" and "Deactivated". All future correspondence for these roles will be sent to Infor's (default) address while still retaining history of the deactivated Christchurch Role address overrides. This will enable the "Christchurch" alternate address to be deleted preventing any further Role address override assignment to "Christchurch".



The [Revert Alternate Address] pull down menu option can be used to change the Role address override from an "Alternate Address" to the specific address that the "Alternate Address" currently represents.



When a Role address override is reverted from an "Alternate Address" then the current address that the "Alternate Address" represents is assigned as a specific Role address override.

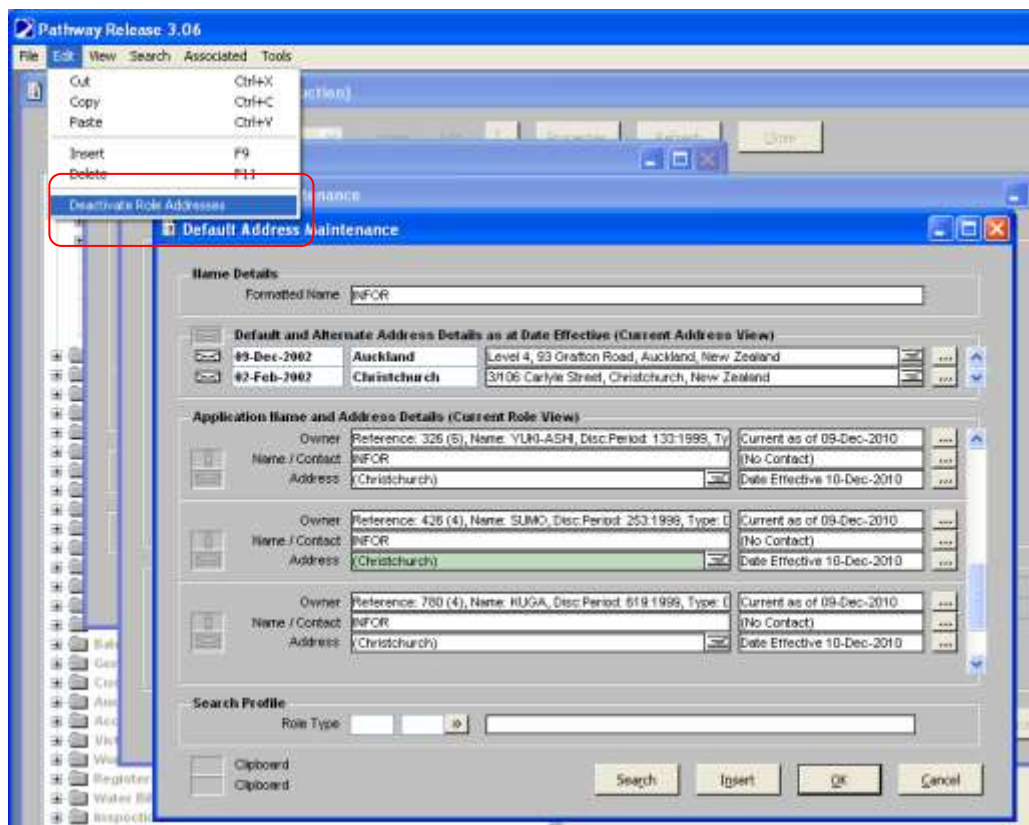
### Deactivating Overriding Role Addresses

Prior to this enhancement Role address overrides could be deactivated by:

- 1) Role Address [...] button on each individual Role and deactivating the Role address overrides.
- 2) [Edit]-[Deactivate Role Addresses] pull down menu to deactivate all Role address overrides.

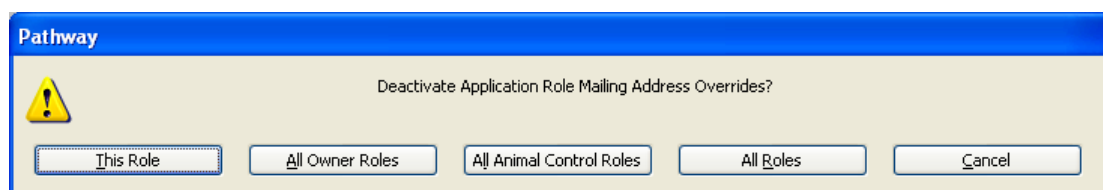
Additional options have been made available to deactivate selected Role address overrides without the need to detail each Role.





The “Deactivate Role Addresses” pull down menu option will display a dialogue question to allow Role address overrides to be deactivated.

Upon the selection of the [Edit]-[Deactivate Role Addresses] pull down menu option a confirmation message is displayed to prevent unwanted deactivations by a user inadvertently selecting an option.



The [This Role] button will deactivate all overriding role addresses for the Role that currently has focus.

The [All Owner Roles] button will deactivate all overriding role addresses on current roles with the same Role Type that currently has focus.

The [All Animal Control Roles] button will deactivate all overriding role addresses on current roles with the same Role Application that currently has focus.

The [All Roles] button will deactivate all overriding role addresses on current roles regardless of Role Application and Type.

The [Cancel] button will cancel the deactivation process.

### Module Name and Address Maintenance

From within each Module the Formatted Address will display the appropriate address regardless of whether the address nominated for the Role is a default address, nominated alternate address or specific role address override.

**Animal Owner Maintenance**

Animal Type:  DOG REGISTRATIONS

**Animal Details**

Animal Status	MOVED	LEFT COUNCIL AREA
Registration Class	F	RENEW DESEXED
Animal Breed	AKITA	AKITA
Animal Colour	SABG	SANDY BEIGE
Animal Name	SUMO	Animal Reference: 426 4
Animal Gender	DESEXED MALE	Physical Id

Current Owner(s) Name:  Address:  Status:

Previous Owner(s) Name: Address: Status:

Buttons: Historic, Letters, Insert, OK, Cancel

Eg:

Animal Owners Name form showing Infor's current Christchurch address as the nominated address for the Animal Ownership Role is the (Christchurch) alternative.

## Role Creation

When a name is selected during a Role creation process a list of overriding Role **Addresses** is presented to **allow the user to optionally select an overriding address** for the newly created Role.

If the selected "Overriding Mailing Name and Address" is based on an "Alternate Address" then the "Alternate Address" will be used as an overriding address for the newly created Role.

ie:

**Overriding Mailing Name and Address Pop Up**

Name Details: Formatted Name:

Default and Alternate Address Details as at Date Effective

27-Sep-2009	(default)	Level 1 Suite 4, 8 Greenhill Rd, Weyville, SA, 5034
06-Jan-2001	(default)	27 Greenhill Rd, Weyville, SA, 5034

Overriding Application Name and Address Details (Current and Historic Role View)

Customer	Booking: 1040 - Booking Class: Bookings by Council (Cash - over	Current as of 18-Nov-2008
Name / Contact	INFOR	(No Contact)
Address	(Auckland) - Level 4, 93 Grafton Road, Auckland, New Zealand	Date Effective 09-Dec-2010
Customer	6161 - EC1 (with Inspections) - 26-May-2009 09:01:33 - Ack	Current as of 26-May-2009
Name / Contact	INFOR	(No Contact)
Address	(Melbourne) - Level 8, 1 Southbank Boulevard, Southbank Vic 30	Date Effective 10-Dec-2010
Document Issued	General Letter (6161) - EC1 (with Inspections)	Current as of 26-May-2009
Name / Contact	INFOR	(No Contact)
Address	(Sydney) - Level 13, Tower A, Zarah Centre, 821-843 Pacific H	Date Effective 10-Dec-2010

Search Profile: Role Type:

Buttons: Search, Select, Quit

Overriding Mailing Name and Address selection form allows selection of existing Role address override based on an "Alternate Address".

## Name and Address Security Considerations

The "Default Address", "Application Address" and "Other Application Address" security settings determine what level of access a User is entitled to when dealing with Default Addresses and Role Address Overrides.

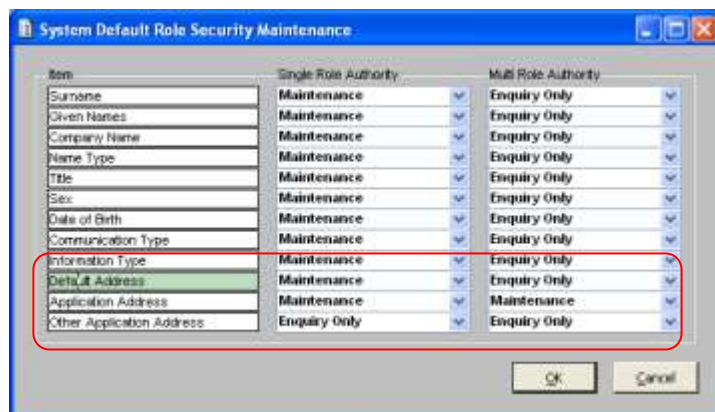
These same security settings determine what level of access a User is entitled to when dealing with Default Alternate Addresses and Role Address Overrides based on Alternate Addresses.

There should be no need to alter these security settings when implementing the Alternate Address functionality.

Eg:

If a User is prohibited from changing a Default Address on a Name that is used by multiple Pathway modules then they will also be prohibited from changing a Default Alternate Address.

Etc...



*Name and Address security settings determine what functions a User can perform in relation to Alternate Addresses when the Name and Address forms are accessed from a Pathway Module.*

### Other Name and Address Functional Considerations

The "Alternate Address" functionality required changes to the following areas to maintain data integrity:

- 1) Duplicate Name Merge  
The Alternate Addresses will be copied from the "Merged From" name(s) to the "Merge To" name.
- 2) Copy Name  
The Copy function available from the Name selection forms will copy the Alternate Addresses.
- 3) Name Audit  
The Name Audit Set reporting will optionally report any modifications to Alternate Addresses.

### Subsidiary Name and Address Functional Considerations

The "Alternate Address" functionality required modifications to the database schema and therefore subsidiary Name and Address functions will be affected.

To all extensive purposes a:

- 1) default "Alternate Address" defined on a name will be excluded from processing.
- 2) A Role with an "Alternate Address" specified will be considered as having an override to the currently effective alternative.

For Example:

The Name Details export process will not export the default Alternate Addresses assigned to a name. Any Roles with an overriding "Alternate Address" will be exported with the current alternate address as a specific override.

Infomart will not show the default Alternate Addresses assigned to a name. Any Roles with an overriding "Alternate Address" will be shown with the current alternate address as a specific override.

The default Alternate Addresses assigned to a name will not be available as merge fields for Word Processing documents. Any Roles with an overriding "Alternate Address" will be shown with the current alternate address as a specific override.

External APIs and Web Services used for Name and Address retrieval and updating will not show the default Alternate Addresses assigned to a name. Any Roles with an overriding "Alternate Address" will be shown with the current alternate address as a specific override.

# System Housekeeping

This Chapter describes those processes which may be performed periodically to 'Clean Up' the Name and Address database.

This involves functions such as merging Duplicate Names and removing unused names, addresses or components.

It is recommended that the update functions documented in this Chapter be submitted to run after your backup.

The following topics are covered in this section:

[Address Component Removal](#)

[Name Removal](#)

[Address Removal](#)

[Formatted Name Rebuild](#)

[Formatted Address Rebuild](#)

[Duplicate Names Maintenance](#)

[Duplicate Address Component Merge](#)

[Name Details Extract](#)

[Audit Set Report](#)

[Name and Address Template Conversion](#)

## Address Component Removal

This section describes how to remove (delete) any unused Address Components for any Address Component Type.

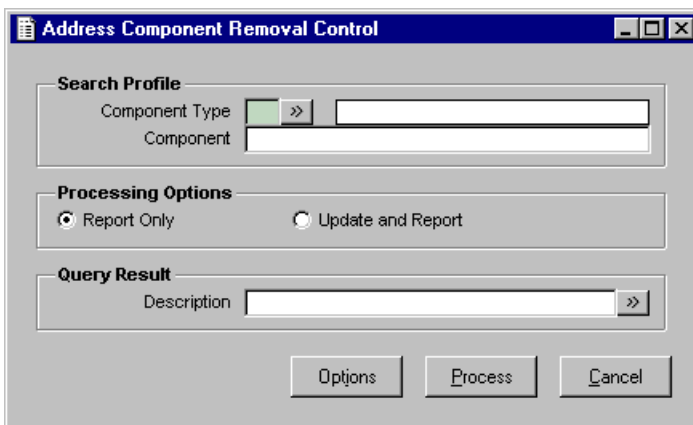
For example:

If Greenhill Road has been created as a Suburb component and has not been used for any addresses then this process will remove it from the list of available address components.

It is recommended that this process be run outside normal working hours.

### Address Component Removal Control Form

This form will allow you to enter a retrieve profile on which to base the clean up operation and to execute the process of removing Address Components which are no longer used.



*Address Component Removal Control Form*

#### Component Type

If this field is left blank then the process will be executed over all Component Types.

If you wish to restrict the clean up to only one component type e.g. Suburb, click on the popup button to display a list of valid component types. This will enable the required Component Type and its associated Description to be selected.

#### Component

This field will allow you to further qualify the clean up process. For example if the Street Component type had been selected and by entering A\* into the component field then only those Street Components starting with A would be removed. This field is case insensitive.

Operands may be used within this field e.g. A\*|C\*|F\* would only remove components starting with A or C or F.

#### Processing Options

This field establishes how the Clean-Up process will be performed. There are two available selections

1. Report Only
2. Update and Report

If Report only is selected then the database will not be updated.

If Update and Report is selected then the database will be updated and a report will be generated via the standard batch processing function.

If the 'Retain Suburbs and Post Codes Imported from Australia Post' is checked off then unused Suburbs and/or Post Codes components will be removed irrespective of whether they were manually entered or imported from the Australia Post file.

If the 'Retain Suburbs and Post Codes Imported from Australia Post' is checked on then unused Suburbs and Post Codes that have been imported from the Australia Post file will not be removed.

**Query Result - Description**

This field allows an existing query to be entered as a search parameter upon which to base your search.

**Process Button**

By pressing the Process button, the clean up process will be executed.



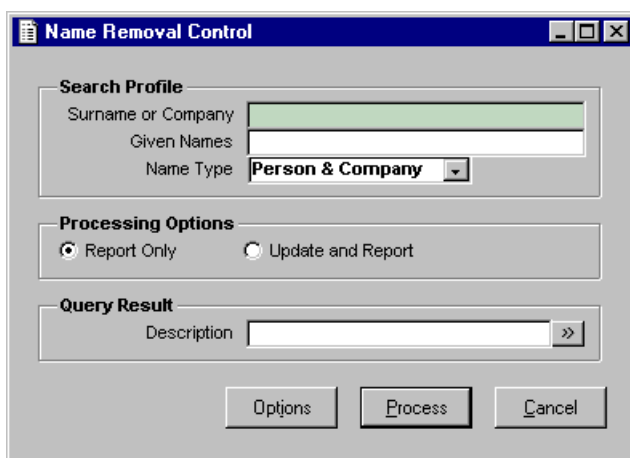
# Name Removal

This section describes how to remove (delete) any names that do not have any Application Role Types associated with them. Both Active and Inactive names will be removed during this clean-up process.

It is recommended that this process be run outside normal working hours.

## Name Removal Control Form

This form enables you to enter the required criteria on which to base the Clean up operation and to execute the process of removing Names which are no longer used. The standard Batch Processing options are available from this form.



*Name Removal Control Form*

### Surname or Company Name

If you wish to restrict the clean to a specific range of names then enter the appropriate information. For example to only remove identities whose surname (and/or company name) starts with an S then enter S\* in this field.

### Given Names

If you wish to restrict the clean up to a specific range of given names then enter the appropriate information. For example to only remove identities whose given name starts with C then enter C\* in this field. The Surname and Given Name fields may be used in conjunction to clean up a particular Name.

### Name Type

If you wish to restrict the clean up to a specific name type then select a name type from the drop down list. The available selections are:-

1. Personal Name
2. Company Name
3. Person and Company

If personal name is selected then only name records for personal names will be processed.  
If Company name is selected then only name records for company names will be processed.  
If person and company is selected then all name records are processed.

### Processing Options

This field establishes how the Clean-Up process will be performed. There are two available selections

1. Report Only

## 2. Update and Report

If Report only is selected then the database will not be updated.

If Update and Report is selected then the database will be updated and a report will be generated via the standard batch processing function.

### **Query Result - Description**

This field allows an existing query to be entered as a search parameter upon which to base your search.

## Address Removal

This section describes how to remove (delete) any Address records that are not linked to a name or role record.

It is recommended that this process be run outside normal working hours.

### Address Removal Form

This form allows you to enter a retrieve profile on which to base the clean up operation and to execute the process of removing Addresses which are no longer used

**Address Removal Control**

**Search Selection**

Template **1** >> Australian Residential Address

**Search Profile**

Property Name

Forwarding

Unit/Level Number

Identifier  >>

Street  >>

Suburb  >>

State  >>

Post Code  >>

**Processing Options**

☒ Report Only ☐ Update and Report

☐ Remove Duplicate Addresses

**Query Result**

Description  >>

Options Process Cancel

*Address Removal Control Form*

### Template

Enter the template on which you wish to base the process. Click on the popup button to display a list of valid templates. The Default template is automatically loaded but can be changed if required.

### Address Prefix Fields

An Address Prefix may be entered in these fields as part of your search profile. The Prefix headings which display on this form are determined by the setup of the Address Template within Name and Address Parameters. These fields are case insensitive. Wildcard searching is available.

### Identifier

An entry in this field will restrict the clean up operation to only those addresses whose identifier matches that entered. If 22 was entered in this field then only addresses whose house number was 22 would be processed.

### Component Type (e.g. Street, Suburb)

An entry in any of the component type fields will restrict the process to that entered. Click on the pop up button to display a list of valid entries for each component type. For example to restrict the process to the suburb of Eastwood enter Eastwood in the Suburb component type field.

**Processing Options**

This field establishes how the Clean-Up process will be performed. There are two available selections

1. Report Only
2. Update and Report

If Report only is selected then the database will not be updated.

If Update and Report is selected then the database will be updated and a report will be generated via the standard batch processing function.

**Remove Duplicate Addresses**

If this flag is checked on then any duplicate addresses linked to a name or role record will be removed from the database, leaving only one occurrence. If none are linked to a name or role record, then all will be deleted. (This will occur only when the Update and Report Processing option is selected.)

**Process**

By pressing the Process button, the clean up will be executed.

**Query Result**

This field allows an existing query to be entered as a search parameter upon which to base your search.

## Australia Post Import

As of Release 3.06, a new Australia Post Import menu option (CNAC7400) has been introduced for the menu: Name and Address Register >> Name and Address System Housekeeping

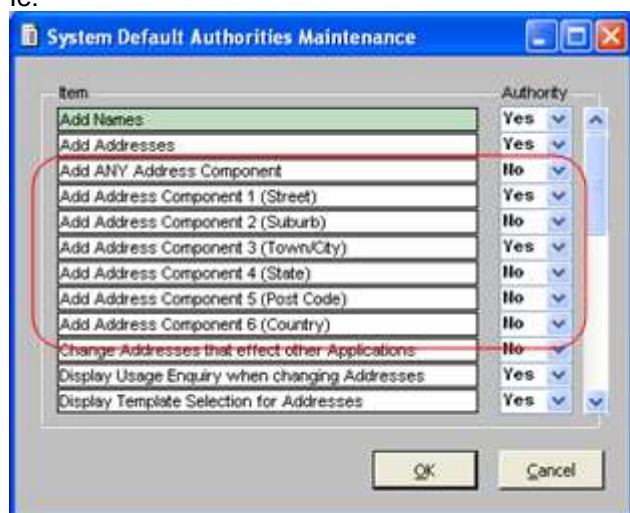
This new form is used to import data files obtained from the Australia Post web site which contains valid Australian Suburb, State and Postcode combinations.

Australia Post provides a free of charge CSV download of the Australian Postcode data file that contains information that can be imported into Pathway to minimise the need for new Postcodes and Suburbs having to be created within Pathway during mailing address creation.

The new Australia Post Import form can be used firstly to compare the existing Pathway address Components and Relationships to that within the import data and also to perform the actual import in order to create any missing Components and Relationships.

The intended functionality entails periodically importing relevant Postcode / Suburb / State combinations into Pathway thus eliminating the need for general users to create Postcodes or Suburbs when entering new mailing addresses.

Additional Name and Address Security Authorities were introduced in Pathway Release 3.05 to prevent users creating specific address component types.  
ie:



*New Security Authorities to prevent users creating specific address component types.*

After the successful import of all Australian Postcode, Suburbs and States it is recommended that the majority of users are prohibited from creating Suburb, State and Postcode components so that only existing components are selected when creating new addresses.

**Australia Post Import Control**

**Search Profile**

Import Format:  >>

Entity:

**Processing Options**

☒ Report Only ☐ Update Only ☐ Update and Report

**Report Options**

☒ Imported  
☒ Excluded  
☒ Not Matched

**Filter By Options**

Suburb:  -

State:  >>

Post Code:  -

Import File:  >>

### PARAMETER SETUP

Before the Australia Post Import can be used some parameters need to be established. Firstly a site must have at least one Address Template which has Suburb, State and Postcode lines where the State and Postcodes are related to the Suburb.

Eg. System Menu >> Name and Address Register >> Name and Address Parameters >> Address Template Parameters

**Address Template Line Maintenance**

Template:

Before Separator	Prefix Description	Prefix Default Value	Case Conversion	Next Separator	Mandatory
New Line	Forwarding		No Conversion	New Line	<input type="checkbox"/>
New Line	Property Name		No Conversion	New Line	<input type="checkbox"/>
New Line	Level/Unit		No Conversion	New Line	<input type="checkbox"/>

Before Separator	Identifier Description	Identifier Default Value	Case Conversion	Next Separator	Mandatory
New Line	House Number		No Conversion	New Line	<input type="checkbox"/>

Before Separator	Sequence	Component Type	Case Conversion	Next Separator	Mandatory	Relations
Space	1	1 Street	Capitalise	New Line	<input type="checkbox"/>	
New Line	2	2 Suburb	All Uppercase	Double Space	<input type="checkbox"/>	
Double Space	3	4 State	All Uppercase	Double Space	<input type="checkbox"/>	
Double Space	4	5 Post Code	Numeric Only	New Line	<input type="checkbox"/>	

Relate back to Suburb Line

**Template Line Relations Maintenance**

**Template Line**

Template: Australian Residential Address

Line: 4

**Related Line**

Line: 2 Suburb:

**Post Code**

0846  
0847  
0850  
0851  
0852

**Relations**

OK Cancel

It is expected that sites intending to use the Australia Post Import will already have this parameter setup in place on one (or more) of their templates and no change will be necessary. Note that all Templates which have Postcode/Suburb and/or State/Suburb will have the relevant relationships imported.

Before being able to use the Australia Post Import form the new Import entity CRPNA13 which is used to receive the Australia Post Import file must be setup via the following menu exactly as shown below:

System Menu >> Query >> Query Parameters >> Export/Import Format Maintenance

**Export/Import Format Search Profile**

Entity: >>

Description:

Export / Import: (All)

New Search Close

**Export/Import Format Maintenance**

Description: **Australia Post Import**  
 Default Export/Import File: **C:\Temp\AusPostImport.csv**  
 Export / Import: **Import Only**

**Export/Import Format**  
☒ Comma Separated (CSV)  
☐ Fixed Width

**Comma Separated Options**  
 Text Qualifier: **(default)**  
 Field Separator Character: **, (Comma)**  
 Include Field List: **Import Only**

**Entity**  
**CRPNA13** >> **Australia Post Data**

**Exportable Fields**

Field Name	Description
TPKCRPNA13	Australia Post Data
U_VERSION	U_VERSION
TFKCBTSJOB	Scheduled Job
PCODE	Post Code
LOCALITY	Suburb
STATE	State

**Selected Field — Description**

**Search Profile**  
 Field Name:

**Buttons:** Search, Sequence, Insert, OK, Cancel

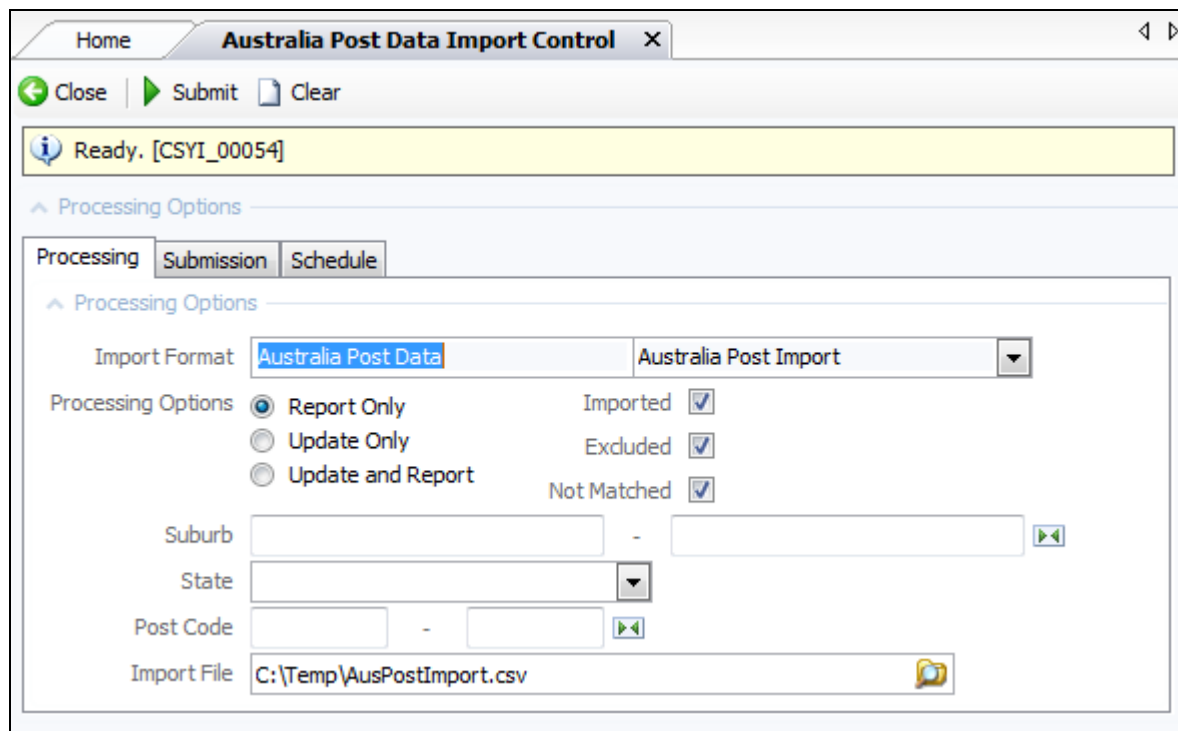
Once the above has been created and saved, the new menu option can be accessed.



## THE AUSTRALIA POST IMPORT FORM

The Import form is shown below for both Smart and Thick Client. The system will default the Import Format to the first found in Parameters as established in the previous section of this document.





Home **Australia Post Data Import Control** X

Close Submit Clear

Ready. [CSYI\_00054]

Processing Options

Processing Submission Schedule

Processing Options

Import Format **Australia Post Data** Australia Post Import

Processing Options

☒ Report Only Imported ☒

☐ Update Only Excluded ☒

☐ Update and Report Not Matched ☒

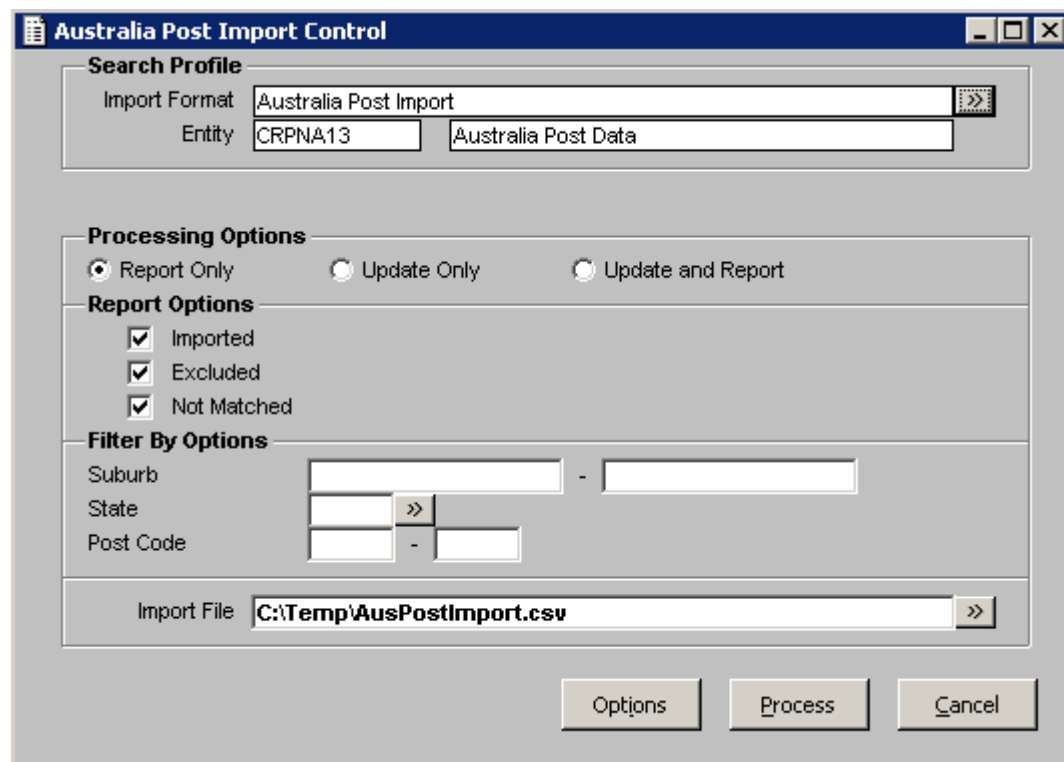
Suburb -

State

Post Code -

Import File C:\Temp\AusPostImport.csv

Smart Client Australia Post Import Form



**Australia Post Import Control**

**Search Profile**

Import Format Australia Post Import

Entity CRPNA13 Australia Post Data

**Processing Options**

☒ Report Only ☐ Update Only ☐ Update and Report

**Report Options**

☒ Imported

☒ Excluded

☒ Not Matched

**Filter By Options**

Suburb -

State >>

Post Code -

Import File C:\Temp\AusPostImport.csv >>

Options Process Cancel

Thick Client Australia Post Import Form

The Australia Post file will need to be manually downloaded from the Australia Post web site, <http://www1.auspost.com.au/postcodes/index.asp?sub=2>, and placed into a network drive that can be accessed by Pathway.

The Australia Post file currently contains more than 16,000 Suburb-State-Postcode combinations for all Australian states and territories.

**Processing Options:**

- Report Only – Performs no data Import. A Report will be produced to indicate what will be Imported, Excluded and whether any existing data does not match the Import.
- Update Only – Perform the Import without a Report. This will create any missing Suburb and Postcode Components and also create Suburb/State and Suburb/Postcode Relationships.
- Update and Report – Performs the Report and Update in the same run.

**Report Options:**

- Imported – Show Components and Relationships that will be created during the Import.
- Excluded – Shows Australia Post Import data that was excluded from the Import due to there being no matching State in the system to import against.
- Not Matched – Shows existing Pathway data which does not match the Australia Post Import data. This may help identify invalid combinations of Suburb/State/Postcode currently in the system as the Report also indicates the number of times such items are used.

IMPORTANT NOTE: It is recommended the “Not Matched” option is only used during a full import. The output is only truly meaningful then and also for internal performance reasons running with a smaller selection will result in the report taking exponentially longer within this Report Option set.

The remaining form options are used to filter what is Imported and identify the location of the Import file itself.

The “Australia Post Import” control form allows optional State selection and also for a range to be specified for the Suburb and Postcode. This allows Council to limit the Address Components imported to those required.

For Example: A Council may choose to only import data for their State. When this is done, however, we also recommend specifying the Postcode range as this will result in a more sensible “Not Matched” report (as it won’t then attempt to find a match for existing Postcode ranges from other States).

Note that the system will never attempt to Import to a State if the State does not already exist in the database. Therefore, if a site has “VIC.” entered (with period on the end), it would need to be changed to “VIC” in order to match the Import before any combinations for that state would be processed. The “Excluded” report section is used to identify address combinations excluded from Import due to no matching State being present.

**OTHER IMPORTANT NOTES**

- Existing Address Component or Address Component Relationship records will NOT be removed by the update process.
- The Report may need a significant period of time to process. For example, a Pathway Address Template configuration which has 20 relationships between Suburb/State/Postcodes amongst all of its various Templates may not have to create many individual Suburbs, Postcodes or States (anywhere from none to approximately 30,000), but it will have to process, compare and potentially create half a million relationship combinations. This may take one to a few hours to process depending upon the performance of the database and could result in a larger Report output which may best be captured electronically in the first instance rather than sent to paper.
- Only one instance of the Import should be run at a time. Attempting to run two or more imports simultaneously will result in unpredictable behavior as the temporary holding area for the import is cleared at the commencement of each run.

It should be noted that existing Address Component or Address Component Relationship records will NOT be removed by the update process.

It should also be noted that the Report may need a significant period of time to process. For example, a Pathway Address Template configuration which has 20 relationships between Suburb/State/Postcodes amongst all of its various Templates may not have to create many individual Suburbs, Postcodes or States

(anywhere from none to approximately 30,000), but it will have to process, compare and potentially create half a million relationship combinations. This may take one to a few hours to process depending upon the performance of the database and could result in a larger Report output which may best be captured electronically in the first instance rather than sent to paper. **REPORT SECTIONS**

There are three main sections to the Report which correspond to the selections on the control form as shown below.

#### REPORT SECTIONS

There are 3 main sections to the Report which correspond to the selections on the control form as shown below:

#### IMPORTED REPORT SECTION

This section of the Report is entitled:

“Imported Report - Components created during Australia Post Import”

This Imported report section has up to four Sub-Sections:

“Postcode Components imported from the Australia Post Import File”

“Suburb Components imported from the Australia Post Import File”

“Suburb/State Relationships imported from the Australia Post Import File”

“Suburb/Postcode Relationships imported from the Australia Post Import File”

Each sub-section will list the full combination of Suburb/State/Postcode that the new imported entry originates from.

Note that when a new Postcode or Suburb is being Imported, the Suburb/State or Suburb/Postcode relationship may not be separately listed as the creation of the relationship is implied.

#### EXCLUDED REPORT SECTION

This section of the Report is entitled:

“Excluded Report - Australia Post Import rows excluded due to unmatched State”

As its title suggests, it simply shows rows excluded from Import due to no matching State being present.

#### NOT MATCHED REPORT SECTION

This section of the Report is entitled:

“Not Matched Report - Existing Components/Relationships that cannot be matched to Australia Post Import data.”

The Not Matched section shows existing Pathway data which does not match the Australia Post Import data. This may help identify invalid combinations of Suburb/State/Postcode currently in the system as the Report also indicates the number of times such items are used.

It should be noted that if the Import is run with a restricted selection (Eg. Just for a single State), then the section of this part of the report may be misleading. Eg. If only “QLD” is selected for Import, then all Suburb and Postcodes from other States will be listed in the relevant sections as Not Matched. This behavior can be reduced by also specifying the Postcode Range for the State, but the Suburbs from other States will still always be listed during such filtering.

This section of the report has the following sub-sections:

#### State Components not matched to the Australia Post Import File

State	Used on Addresses	Created by User on Date	Last updated by User on Date
-------	-------------------	-------------------------	------------------------------

#### Postcode Components not matched to the Australia Post Import File

Postcode	Used on Addresses	Created by User on Date	Last updated by User on Date
----------	-------------------	-------------------------	------------------------------

#### Suburb Components not matched to the Australia Post Import File

Suburb/State/Postcode	Used on Addresses	Created by User on	Last updated by User
-----------------------	-------------------	--------------------	----------------------

		Date	on Date
--	--	------	---------

**Suburb/State Relationships not matched to the Australia Post Import File**

Suburb/State/Postcode	Used on Addresses	Created by User on Date	Last updated by User on Date
-----------------------	-------------------	-------------------------	------------------------------

**Suburb/Postcode Relationships not matched to the Australia Post Import File**

Suburb/State/Postcode	Used on Addresses	Created by User on Date	Last updated by User on Date
-----------------------	-------------------	-------------------------	------------------------------

**Property Suburb/State/Postcode Relationships not matched to the Australia Post Import File**

Property Suburb/State/Postcode	Current or Merged	Created by User on Date	Last updated by User on Date
--------------------------------	-------------------	-------------------------	------------------------------

## REPORT COLUMN DETAILS

- **Component or Relationship**  
Is the name of the Component or Relationship without a corresponding match on the import file.
- **Used on Addresses**  
Is the number of Pathway Addresses that reference the Component or Relationship without a corresponding match on the import file. This report column is only applicable to Name and Address elements.
- **Current or Merged**  
Is the status of the Property Suburb/State/Postcode without a corresponding match on the import file. This report column is only applicable to Property elements.
- **Created by User on Date**  
Indicates by whom and when the Component or Relationship was created.
- **Last Updated by User on Date**  
Indicates by whom and when the Component or Relationship was last updated.

**Note:** that the “Created by User on Date” and “Last Updated by User on Date” information is extracted from the Pathway Auditing system. If Auditing is not active on the relevant tables then this information may not be available or current. The tables for which Auditing needs to be active to provide up to date Created and Last Updated information are:

- CNACOMP – Address Component
- CNARELN – Address Component Relation
- LPASUBR – Property Suburb
- LPASBPC – Property Suburb Postcodes

## Formatted Name Rebuild

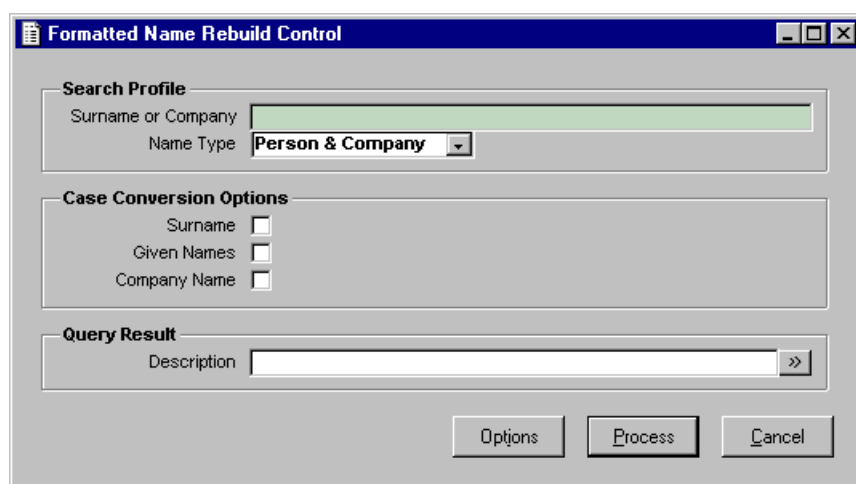
This section describes how to apply all Case Conversion rules to Surnames, Company Names and Given Names. If the "File Mc with Mac" option has been amended, the Names will be re-sequenced. Case conversion and Sequencing rules are defined at the System Parameter level within the Name and Address system.

This process will rebuild all formatted names against both Name and Application Role records.

**Note:** Names with the Case Conversion Rule of 'No Conversion' will not be modified during this process.

### Formatted Name Rebuild Form

This form allows you to enter a retrieve profile on which to base the clean up operation, enter case conversion options and to execute the process.



The screenshot shows a Windows-style dialog box titled "Formatted Name Rebuild Control". It contains three main sections: "Search Profile" with a text field for "Surname or Company" and a dropdown for "Name Type" set to "Person & Company"; "Case Conversion Options" with three checkboxes for "Surname", "Given Names", and "Company Name", all of which are currently unchecked; and "Query Result" with a text field for "Description" and a right-pointing arrow button. At the bottom right are three buttons: "Options", "Process", and "Cancel".

*Formatted Name Rebuild Form*

#### Surname or Company

To enable the restriction of the reformatting to a specific range of names, enter the appropriate information. For example to only reformat identities whose Surname (and/or Company name) starts with an S, enter S\* in this field.

#### Name Type

To enable the restriction of the process to a specific name type, select a name type from the drop down list. Three options are available from the drop down list.

1. Personal Name
2. Company Name
3. Person and Company

#### Surname

This box should be checked on to apply the reformatting to the Surname field. To bypass the reformatting of the Surname field then leave this box checked Off.

#### Given Names

This box should be checked on to apply the reformatting to the Given name field. To bypass the reformatting of the Given name field then leave this box checked Off.

#### Company Name

To apply the reformatting to Company names then check this box ON.  
To bypass the reformatting of Company names then leave this box checked OFF.

**Process**

If this button is executed the reformat process will begin.

**Query Result**

This field allows an existing query to be entered as a search parameter upon which to base your search.

## Formatted Address Rebuild

This section describes how to apply all Address formatting rules to Address records and the relevant Components which make up those Addresses.

Address formatting rules are defined at the System Parameter level within the Name and Address System.

This process will rebuild all Formatted Addresses against both Name and Application Role records.

This function can also be used to make changes to existing addresses. The following example describes the process for changing a postcode for an existing suburb:

### **Option 1**

To change a postcode when this postcode is attached to only one suburb:

(e.g.. If the postcode 5067 is attached only to the suburb KENSINGTON, and you wish to change it to 5068), proceed as follows:

1. Select Name and Address Parameters/Address Component Maintenance
2. Detail out on the Postcode line to the Component Maintenance Form
3. Search for the postcode 5067
4. Change the postcode 5067 to 5068
5. Select Name and Address System Housekeeping/Rebuild Formatted Addresses
6. Enter the old postcode (e.g. 5067) in the Postcode field
7. Check on the Postcode Case Conversion option and select Process

This procedure should rebuild all addresses which used the old postcode.

### **Option 2**

To change a postcode which is used by more than one suburb and the postcode is changing on all suburbs:

Proceed as per Option 1

### **Option 3**

To change a postcode which is shared by 2 suburbs, and only one suburb's postcode is changing:

(e.g.. MILE END and BROMPTON PARK both use the postcode 5032, but MILE END has been changed to 5031) proceed as follows:

1. Determine which suburb has the greater number of addresses attached to it. (e.g.. MILE END)
2. Follow the procedure for Option 1 to change the current postcode of 5032 to 5031.
3. Search for addresses using the secondary suburb (e.g. BROMPTON PARK)
4. Manually change the postcode for each address.
5. If there are now two postcodes of 5031, perform a Duplicate Component Merge process to eliminate the second 5031.

## Formatted Address Rebuild Form

This form allows you to enter a search profile on which to base the reformatting operation, enter case conversion options and to execute the process.

*Formatted Address Rebuild Control Form*

### Template

Enter the template on which you wish to base the process. Click on the popup button to display a list of valid templates. The default template is automatically loaded. The Description of the selected Template code will display.

### Address Prefix Fields

An Address Prefix may be entered in these fields as part of your search profile. The Prefix headings which display on this form are determined by the setup of the Address Template within Name and Address Parameters. These fields are case insensitive. Wildcard searching is available.

### Identifier

An entry in this field will restrict the reformatting operation to only those addresses whose identifier matches that entered. If 22 was entered in this field then only addresses whose house number was 22 would be processed.

### Component Type (e.g. Street, Suburb)

An entry in any of the component type fields will restrict the process to that entered. Click on the pop up button to display a list of valid entries for each component type. For example to restrict the process to the suburb of Eastwood enter Eastwood in the Suburb component type field.

### Case Conversion Options

These boxes should be checked on to apply the reformatting to the specified Component. To bypass the reformatting of the specified Component then leave these boxes checked Off. Reformatting can be applied to the following Components:

- ☐ Identifier
- ☐ Street
- ☐ Suburb
- ☐ City
- ☐ State
- ☐ Postcode
- ☐ Country

### Query Result



This field allows an existing query to be entered as a search parameter upon which to base your search.

**Process**

By pressing this button, the reformatting process will be executed.

**Duplicate Name Extraction**

This section describes how to extract Names deemed as duplicates (according to the selection criteria) in preparation for the Duplicate Names Maintenance function.

This process may be run as many times as desired. No names will be deleted as a result of this function.

The function provides the means to investigate duplicate name groups and record whether the names are to remain as individuals or whether they are, in fact, duplicates which should be merged.

Subsequent Duplicate Name Extractions will not report these previously identified individuals as duplicates.

**Duplicate Name Status**

The status on each name within a group of duplicate names is used to identify names that have been previously investigated and deemed to be individuals.

A status of "Possible Duplicate" indicates that the name was identified as a possible duplicate by the last extraction process and requires checking.

A status of "Known Individual" indicates that the name was initially identified as a possible duplicate and investigation has deemed that the matching name should not be merged.

**Suggested Duplicate Names Management Procedure**

*This section describes a procedure to effectively manage duplicate names.*

**Initial Duplicate Names Extraction**

*Duplicate Names are identified based on the "Number of Matching Characters to Identify Duplicates" and "Duplicate Names must have Identical" settings when the extraction process is performed.*

*The settings need to be tailored so that the majority of duplicate names are extracted and some experimentation is required to determine the most appropriate number of matching characters.*

*If the number of matching characters is too small then an excessive number of names will be extracted as potential duplicates. If the number of matching characters is too large then names that are true duplicates may not be extracted.*

*When the appropriate "Number of Matching Characters to Identify Duplicates" have been determined it is recommended that they be saved as the System Default via the [Options] button.*

***Both the "Clear previously Extracted Duplicate Names" options should be checked OFF prior to saving the system default.***

*The initial Duplicate Name Extraction should be performed with both the "Clear previously Extracted Duplicate Names" options checked ON.*

**Duplicate Names Extraction Control**

**Search Profile**

Surname or Company: \*

Given Names:

Name Type: **Person & Company**

**Duplicate Names must have Identical**

Phonetic Key: ☐

Mailing Address: ☐

**Number of Matching Characters to Identify Duplicates**

Surname or Company: **50**

First Given Name: **3**

Second Given Name: **3**

Personal Name Title:

**Clear previously Extracted Duplicate Names**

Possible Duplicates: ☒

Known Individuals: ☒

Options Process Cancel

*Note: All subsequent Duplicate Name Extractions should be performed with both the “Clear previously Extracted Duplicate Names” options checked OFF. This will prevent Duplicate Names previously identified as individuals being cleared and avoid the necessity to investigate whether a name merge needs to be performed.*

### Duplicate Names Maintenance

The Duplicate Names Maintenance function provides the ability to select groups of Duplicate Names based on the Status of the names within the group.

After the initial Duplicate Names Extraction all names will have a status of “Possible Duplicate” and therefore only the “Groups with Possible Duplicate Name Only” search profile will display any groups.

**Duplicate Name Search Profile**

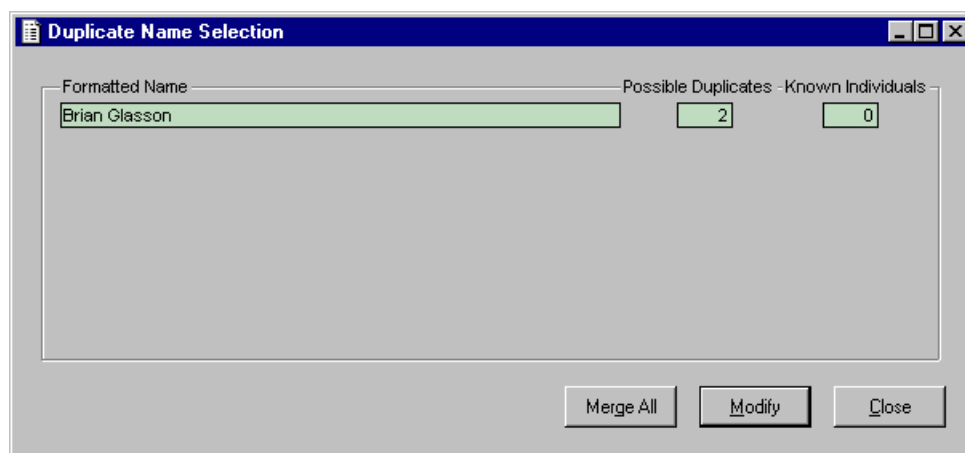
☐ Groups with Known Individual Names Only

☒ Groups with Possible Duplicate Names Only

☐ Groups with Possible Duplicate Names and Known Individual Names

Search Close

The Duplicate Names Selection displays the number of names in the group that are “Possible” Duplicates” and “Known Individuals”.



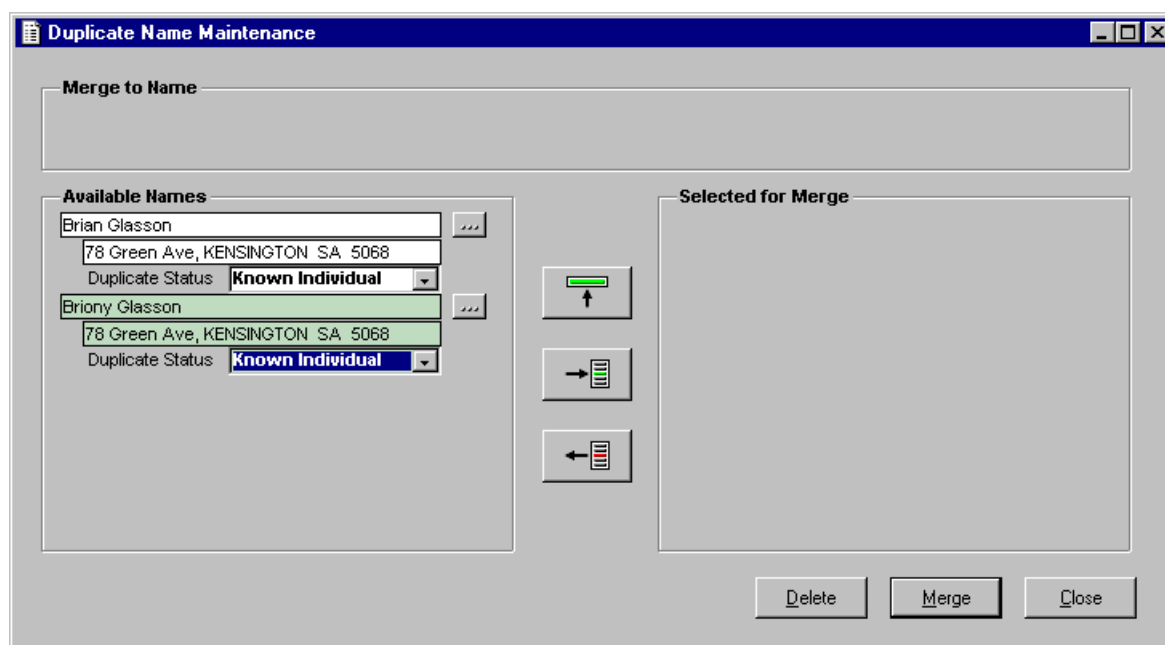
**Duplicate Name Selection**

Formatted Name	Possible Duplicates	Known Individuals
Brian Glasson	2	0

Buttons: Merge All, Modify, Close

*The Duplicate Names Maintenance function can be used to merge any names that are deemed to be duplicates.*

*The status of any names that have been deemed to be individuals should be changed from “Possible Duplicate” to “Known Individual”.*



**Duplicate Name Maintenance**

Merge to Name

**Available Names**

Brian Glasson  
78 Green Ave, KENSINGTON SA 5068  
Duplicate Status: Known Individual

Briony Glasson  
78 Green Ave, KENSINGTON SA 5068  
Duplicate Status: Known Individual

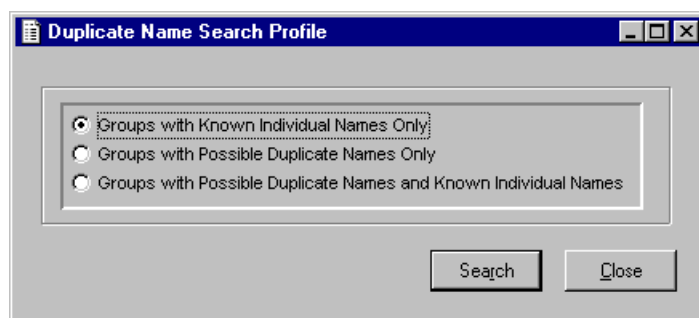
**Selected for Merge**

Buttons: Delete, Merge, Close

*All Duplicate Name groups need to be investigated and updated to provide a comparison base for all future Duplicate Name Extractions.*

*The scale of the tasks is dependent on the number of duplicate names extracted.*

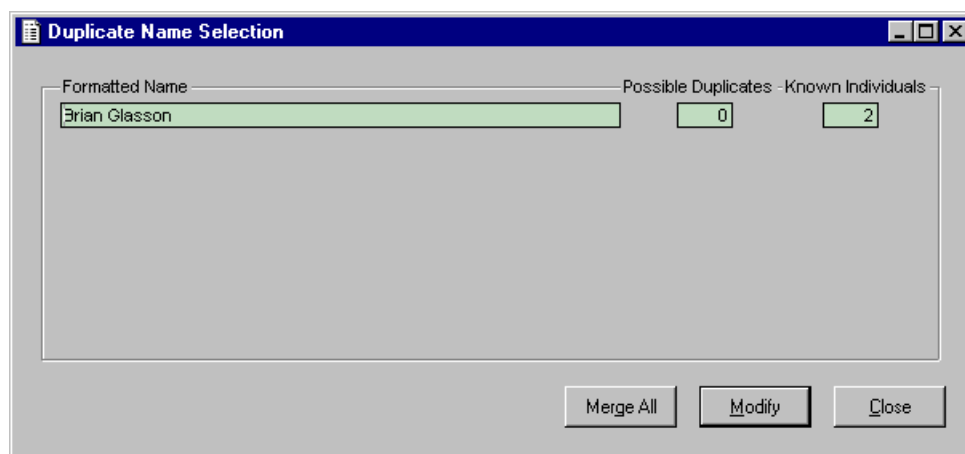
*After the investigation process all remaining names will have a status of “Known Individual” and therefore only the “Groups with Known Individuals” search profile will display any groups.*



**Duplicate Name Search Profile**

☒ Groups with Known Individual Names Only  
☐ Groups with Possible Duplicate Names Only  
☐ Groups with Possible Duplicate Names and Known Individual Names

Buttons: Search, Close



The **Duplicate Name Selection** dialog box displays a table with the following data:

Formatted Name	Possible Duplicates	Known Individuals
Brian Glasson	0	2

At the bottom of the dialog are three buttons: **Merge All**, **Modify**, and **Close**.

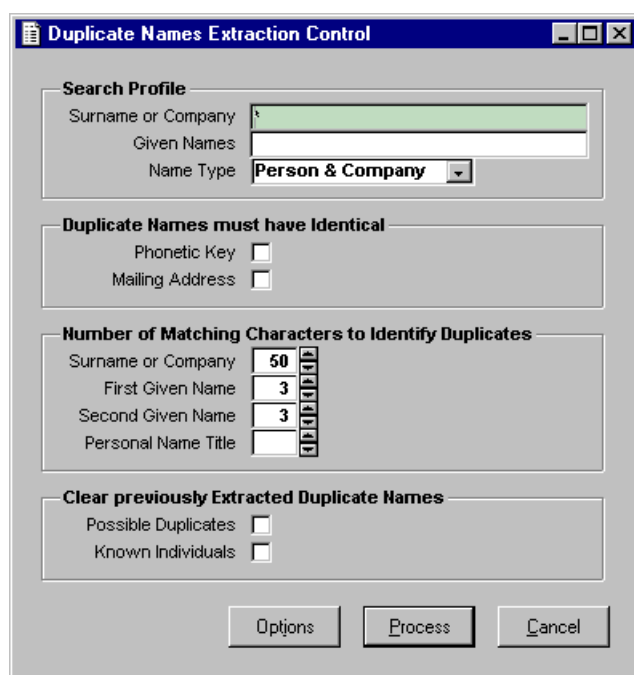
### **Subsequent Duplicate Names Extraction**

The Duplicate Names Extraction should be performed on a periodic basis to identify any new duplicate names that have been created.

The interactive Name entry function identifies potential duplicates when a new name is created and therefore a weekly Duplicate Names Extraction schedule is more than adequate.

All subsequent Duplicate Name Extraction should be performed with both the "Clear previously Extracted Duplicate Names" options checked OFF.

This will prevent Duplicates Names previously identified as individuals being cleared and avoid the necessity to investigate whether a name merge needs to be performed.



The **Duplicate Names Extraction Control** dialog box contains the following sections:

- Search Profile:**
  - Surname or Company: [Text Field]
  - Given Names: [Text Field]
  - Name Type: **Person & Company** (Dropdown)
- Duplicate Names must have Identical:**
  - Phonetic Key: ☐
  - Mailing Address: ☐
- Number of Matching Characters to Identify Duplicates:**
  - Surname or Company: **50** (Spin Box)
  - First Given Name: **3** (Spin Box)
  - Second Given Name: **3** (Spin Box)
  - Personal Name Title: [Spin Box]
- Clear previously Extracted Duplicate Names:**
  - Possible Duplicates: ☐
  - Known Individuals: ☐

At the bottom are three buttons: **Options**, **Process**, and **Cancel**.

The process will not extract any names where the duplicate status has been changed to "Known Individual".

When a new name meets the matching criteria of a "Known Individual" then the new name is added as a "Possible Duplicate" to the existing group.

These groups can be displayed by using the "Groups with Possible Duplicate Names and Known Individual Names" search profile in the Duplicate Names Maintenance function.

When two or more names meet the matching criteria and none of the names have been previously recorded as a "Known Individual" then a new group is created.

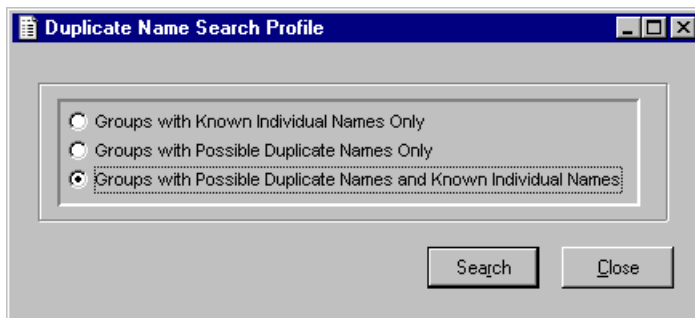
These groups can be displayed by using the "Groups with Possible Duplicate Names Only" search profile in the Duplicate Names Maintenance function.

**Subsequent Duplicate Names Maintenance**

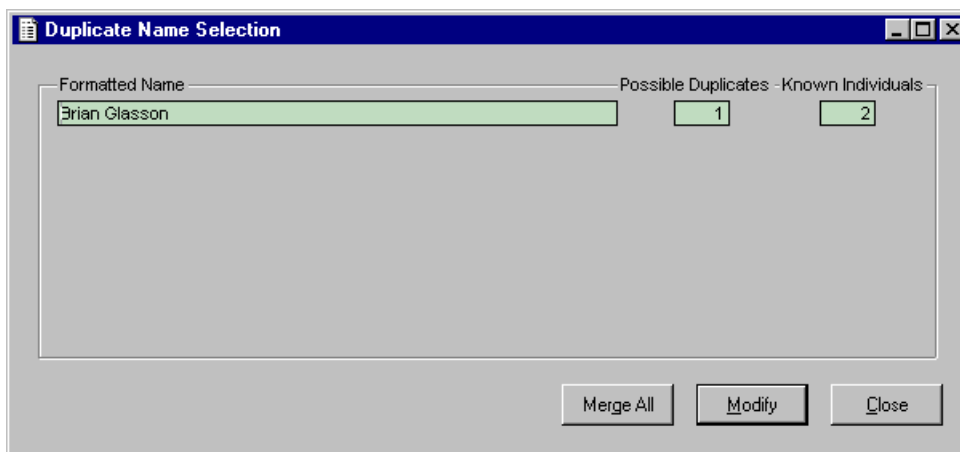
*As the Duplicate Names Extraction ignores all names with a status of "Known Individual" the number of new "Possible Duplicate" names should be minimal.*

*Any new groups of possible duplicates can be displayed by using the "Groups with Possible Duplicate Names Only" search profile.*

*Any new names that match "Known Individual" names can be displayed by using the "Groups with Possible Duplicate Names and Known Individual Names" search profile.*

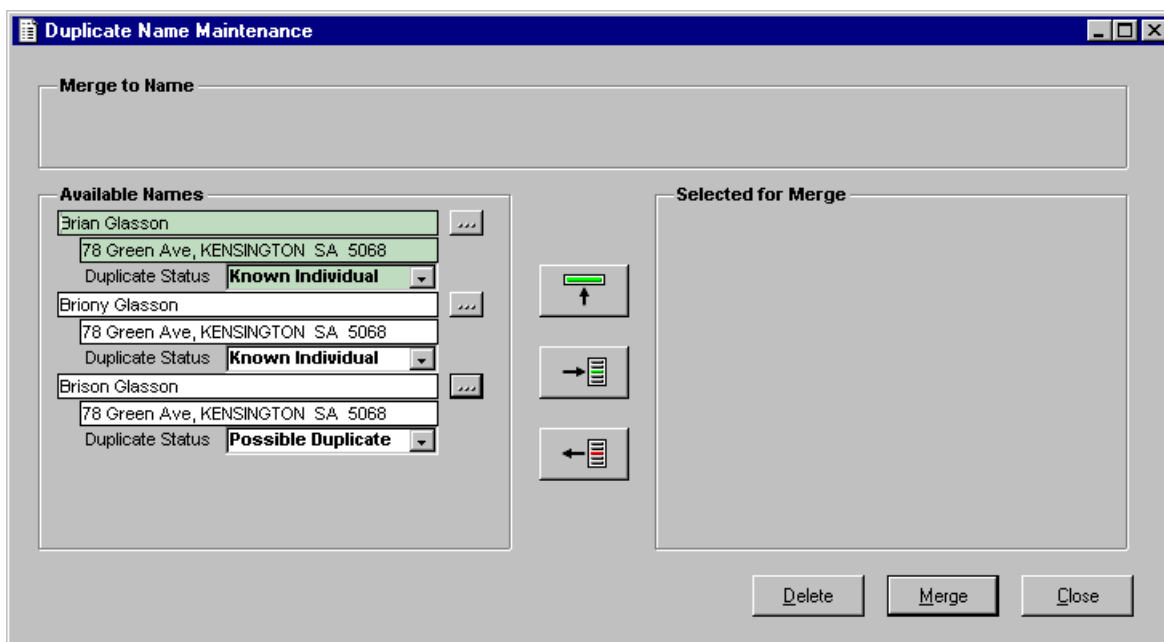


The dialog box titled "Duplicate Name Search Profile" contains three radio button options. The first two are "Groups with Known Individual Names Only" and "Groups with Possible Duplicate Names Only". The third option, "Groups with Possible Duplicate Names and Known Individual Names", is selected. At the bottom are "Search" and "Close" buttons.



The dialog box titled "Duplicate Name Selection" displays a table with two columns: "Formatted Name" and "Possible Duplicates - Known Individuals". The first row shows "Brian Glasson" with counts of 1 and 2. Below the table are "Merge All", "Modify", and "Close" buttons.

Formatted Name	Possible Duplicates	Known Individuals
Brian Glasson	1	2



The dialog box titled "Duplicate Name Maintenance" is used for managing name duplicates. It features a "Merge to Name" field at the top. Below are two main sections: "Available Names" on the left and "Selected for Merge" on the right. The "Available Names" section lists three entries for "Brian Glasson" (all with address "78 Green Ave, KENSINGTON SA 5068") and one for "Brison Glasson" (same address). The first two are marked as "Known Individual" and the last as "Possible Duplicate". Between the sections are three arrow buttons for moving items. At the bottom are "Delete", "Merge", and "Close" buttons.

*A decision needs to be made whether the new “Possible Duplicate” should be merged with an existing “Known Individual” or updated to a status of “Known Individual”.*

## Duplicate Names Extraction Control Form

This form allows input of the criteria on which you wish to base the extraction process.

The screenshot shows the 'Duplicate Names Extraction Control' dialog box. It has a title bar with a document icon and standard window controls. The form is divided into several sections: 'Search Profile' with text boxes for 'Surname or Company' and 'Given Names', and a dropdown for 'Name Type' set to 'Person & Company'; 'Duplicate Names must have Identical' with checkboxes for 'Phonetic Key' and 'Mailing Address', both unchecked; 'Number of Matching Characters to Identify Duplicates' with spinners for 'Surname or Company' (set to 1), 'First Given Name' (set to 1), 'Second Given Name' (set to 1), and 'Personal Name Title' (set to 1); and 'Clear previously Extracted Duplicate Names' with checkboxes for 'Possible Duplicates' and 'Known Individuals', both unchecked. At the bottom are 'Options', 'Process', and 'Cancel' buttons.

*Duplicate Names Extraction Control Form*

### Example settings

A: The following settings would be used for an initial extraction.

This screenshot shows the same dialog box but with example settings applied. In the 'Search Profile' section, the 'Surname or Company' box contains an asterisk (\*). In the 'Number of Matching Characters to Identify Duplicates' section, the 'Surname or Company' spinner is set to 50, 'First Given Name' is set to 3, and 'Second Given Name' is set to 3. In the 'Clear previously Extracted Duplicate Names' section, both 'Possible Duplicates' and 'Known Individuals' checkboxes are now checked. The 'Options', 'Process', and 'Cancel' buttons remain at the bottom.

*Duplicate Names Extraction Control Form showing initial settings*

B: After an initial conversion, the following settings would be recommended for periodic maintenance purposes to identify new duplicates. The extracted duplicates should then be looked at by the user (in Duplicate Names Maintenance) and discretion used to determine whether they are in fact duplicates and require merging.

The screenshot shows a Windows-style dialog box titled "Duplicate Names Extraction Control". It contains several sections:

- Search Profile:** Includes text boxes for "Surname or Company" (containing "SMIT\*") and "Given Names" (containing "P\*|F\*"). A "Name Type" dropdown menu is set to "Person & Company".
- Duplicate Names must have identical:** Two checkboxes, "Phonetic Key" and "Mailing Address", both of which are unchecked.
- Number of Matching Characters to Identify Duplicates:** Four spinners for "Surname or Company" (set to 50), "First Given Name" (set to 3), "Second Given Name" (set to 3), and "Personal Name Title" (set to 1).
- Clear previously Extracted Duplicate Names:** Two checkboxes, "Possible Duplicates" and "Known Individuals", both unchecked.

At the bottom are three buttons: "Options", "Process", and "Cancel".

*Example settings for periodic maintenance*

### Surname or Company

If you wish to restrict the extract to a specific range of Surnames then enter the appropriate information. For example to only extract Names whose Surname (and/or Company name) starts with a SMIT then enter SMIT\* in this field.

### Given Names

If you wish to restrict the extract to a specific range of given names then enter the appropriate information. For example to only extract Names whose given names start with P or F then enter P\*|F\* in this field.

### Name Type

To restrict the process to a specific name type select a Name type from the drop down list. Three options are available from the drop down list.

1. Personal Name
2. Company Name
3. Person and Company

### Duplicate Names must have identical - Phonetic Key

If this checkbox is checked on, the Name Extraction process will extract Names which are phonetically matching (i.e. sound the same). This option enables a full list of possible duplicate Surnames to be identified for further investigation. It is recommended that the Duplicate Matching Characters are left blank if Phonetic matching is to be utilised.

**Note:** The number of matching Surname characters cannot be 0 if you are not matching Phonetic keys. i.e. If the Phonetic Key flag is set off, then a number must be entered in the Surname or Company Matching Characters field.

### Duplicate Names must have identical - Mailing Address

If this flag is checked on then only those duplicate names with matching addresses will be extracted.

This function works best if duplicate addresses have been removed first (i.e.. In Address Removal Control, select the Remove Duplicate Addresses checkbox and run an update and report.)

Set "Number of Matching Characters to Identify Duplicates" to 50 (maximum) for each of the name fields, to allow for identical names.

**Number of Matching Characters to Identify Duplicates: Surname or Company**

Enter here the number of characters in the surname that must match before the name record is extracted. For example if 5 was entered then the first five characters of the Surname must match before the name is extracted as a possible duplicate (subject to the other criteria entered).

Refer to 175 (Duplicate Names Extraction Control form section) for details on recommended settings.

**Number of Matching Characters to Identify Duplicates: First Given Name**

Enter here the number of characters in the given name that must match before the name record is extracted. For example if 3 was entered then the first three characters of the given name must match before the name is extracted as a possible duplicate (subject to the other criteria entered).

Refer to 175 (Duplicate Names Extraction Control form section) for details on recommended settings.

**Number of Matching Characters to Identify Duplicates: Second Given Name**

Enter here the number of characters in the second given name that must match before the name record is extracted. For example if 3 was entered then the first three characters of the second given name must match before the name is extracted as a possible duplicate (subject to the other criteria entered).

Refer to 175 (Duplicate Names Extraction Control form section) for details on recommended settings.

**Number of Matching Characters to Identify Duplicates: Personal Name Title**

Enter here the number of characters in the Personal Name Title that must match before the name record is extracted. For example if 3 was entered then the first three characters of the Personal Name Title must match before the name is extracted as a possible duplicate (subject to the other criteria entered). This prevents identical names with different Titles being extracted as duplicates, e.g.

Mr E. Smith  
Mrs E. Smith

Refer to 175 (Duplicate Names Extraction Control form section) for details on recommended settings.

**Clear Previously Extracted Duplicate Names - Possible Duplicates**

If the Possible Duplicates Clear box is checked ON then the existing Possible Duplicates extract table will be cleared and the new extract data updated into the extract table. This flag would be checked ON when performing the initial extraction. Subsequent maintenance extract processes would be performed with this flag checked OFF.

If the Possible Duplicates Clear box is checked OFF then the existing extract table will remain and the new extract data added to the extract table. This would be the correct response for subsequent extracts after an initial extract has been performed.

**Clear Previously Extracted Duplicate Names - Known Individuals**

If the Known Individuals Clear box is checked ON then the existing Known Individuals extract table will be cleared and the new extract data updated into the extract table. This flag would be checked ON when performing the initial extraction. Subsequent maintenance extract processes would be performed with this flag checked OFF.

If the Known Individuals Clear box is checked OFF then the existing extract table will remain and the new extract data added to the extract table. This would be the correct response for subsequent extracts after an initial extract has been performed.

**Process**



By pressing the Process button, the extraction will be executed.

## Duplicate Names Maintenance

The Duplicate Names Maintenance function provides the ability to select groups of Duplicate Names based on the Status of the names within the group.

After the initial Duplicate Names Extraction all names will have a status of "Possible Duplicate" and therefore only the "Groups with Possible Duplicate Name Only" search profile will display any groups.

This section describes how to select extracted name records to merge. Names are extracted using the Extract Names function described previously.

Where two name records are merged into one then all application role associations will be moved to the nominated default name.

The Address of the Default Name will be allocated to the Merged Name. If changes are required to the Address this will need to be performed via Name and Address Maintenance after the Merge has completed.

When two names with different Default Mailing Addresses are merged, then the Default Mailing Address of the "Merged From" name is applied as a "Role Mailing Address" to all "Merged From" Role records with a (default) mailing address.

The following examples illustrate the result of the modification.

Example 1.

Merge process when the "Merge From" and "Merge To" Names have identical default mailing addresses:

Merge TO Name Details

Name : Andrew Smith

Default Address: 208 Greenhill Road, Eastwood 5063

Animal Owner : Application Mailing Address = (default)

Merge FROM Name Details

Name : A Smith

Default Address: 208 Greenhill Road, Eastwood 5063

Property Owner : Application Mailing Address = c/o L J Hooker Real Estate.....

Rate Payer: Application Mailing Address = (default)

(All Rate Payer correspondence is addressed to "A Smith, 208 Greenhill Road, Eastwood 5063)

Result of Merging "Andrew Smith" and "A Smith"

Name : Andrew Smith

Default Address: 208 Greenhill Road, Eastwood 5063

Animal Owner : Application Mailing Address = (default)

Property Owner : Application Mailing Address = c/o L J Hooker Real Estate.....

Rate Payer: Application Mailing Address = (default)

(All Rate Payer correspondence is addressed to "Andrew Smith, 208 Greenhill Road, Eastwood 5063)

Example 2.

Merge process when the "Merge From" and "Merge To" Names have different default mailing addresses.

Merge TO Name Details

Name : Andrew Smith

Default Address: 208 Greenhill Road, Eastwood 5063

Animal Owner : Application Mailing Address = (default)

Merge FROM Name Details

Name : A Smith

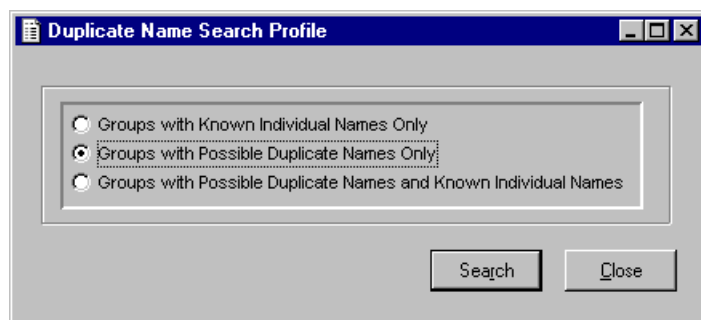
Default Address: 211 Flinders Street, Adelaide 5000

Property Owner : Application Mailing Address = c/o L J Hooker Real Estate.....

Rate Payer: Application Mailing Address = (default)

(All Rate Payer correspondence is addressed to "A Smith, 211 Flinders Street, Adelaide 5000)

## Duplicate Name Search Profile Form



*Duplicate Name Search Profile Form*

### Search Profile Options

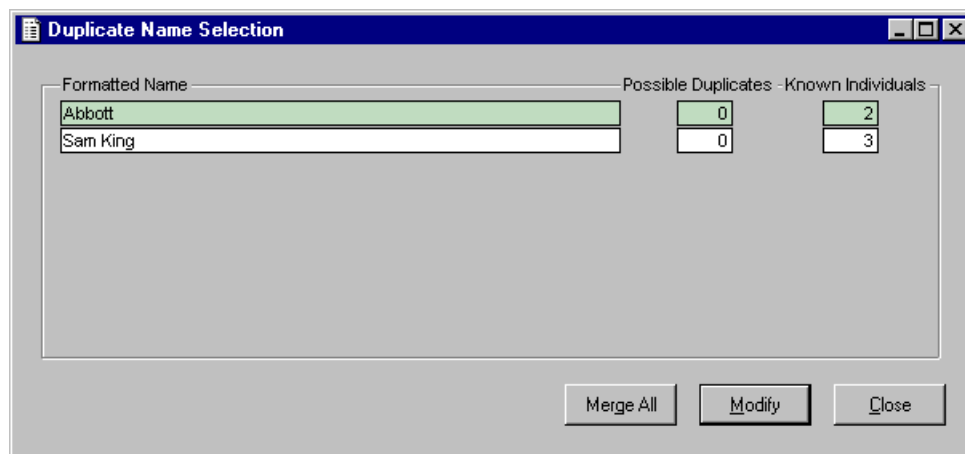
The options available are as follows:

- ☐ Groups with Known Individual Names Only
- ☐ Groups with Possible Duplicate Names Only
- ☐ Groups with Possible Duplicate Names and Known Individual Names

Selection of one of the search profile options will display the selected groups of duplicate names.

## Duplicate Name Selection Form

This form displays a list of potential Duplicate Names, based on the search criteria entered previously. Select one of the available Formatted Names to perform the Name Merging Function.



Formatted Name	Possible Duplicates	Known Individuals
Abbott	0	2
Sam King	0	3

*Duplicate Name Selection Form*

### Formatted Name

A list of Formatted Names which have been selected based on the Duplicate Name Extraction criteria will display. Click on the required name and select the MODIFY button to perform a Duplicate Name Merge.

### Possible Duplicates

This field displays the number of Possible Duplicate names extracted for this group.

### Known Individuals

The field displays the number of extracted names within the group with a status of 'Known Individual'.

### Merge All

Select this button if you wish to merge all the displayed names with their duplicate names. You will be required to confirm your selection before the merge proceeds.

## Duplicate Name Maintenance Form

This form allows you to select a name record to become the default record, merge selected names into the default record and delete name records from the extract file. The Duplicate Status of the name record can also be modified.

When the form is first presented all names will appear in the Available Names column.

A name is selected to become the default name into which other names will be merged. The default name is selected using the "Select as Default" button in the centre of the form.

Other names are selected and moved into the Selected to Merge column using the "Select" button in the centre of the form. Any name appearing in the Selected to Merge column will be merged into the default name once the Merge button is activated.

Names may be moved back into the Available Names column using the "Remove" button in the centre of the form.

### Duplicate Names Merge Function

When two names with different Default Mailing Addresses are merged, then the Default Mailing Address of the "Merged From" name is applied as a "Role Mailing Address" to all "Merged From" Role records with a (default) mailing address.

### Example .

Merge process when the "Merge From" and "Merge To" Names have **identical** default mailing addresses:

#### *Merge TO Name Details*

Name : Andrew Smith  
Default Address : 208 Greenhill Road, Eastwood 5063  
Animal Owner : Application Mailing Address = (default)

#### *Merge FROM Name Details*

Name : A Smith  
Default Address : 208 Greenhill Road, Eastwood 5063  
Property Owner : Application Mailing Address = c/o L J Hooker Real Estate.....  
Rate Payer: Application Mailing Address = (default)  
(All Rate Payer correspondence is addressed to "A Smith, 208 Greenhill Road, Eastwood 5063)

#### *Result of Merging "Andrew Smith" and "A Smith"*

Name : Andrew Smith  
Default Address : 208 Greenhill Road, Eastwood 5063  
Animal Owner : Application Mailing Address = (default)  
Property Owner : Application Mailing Address = c/o L J Hooker Real Estate.....  
Rate Payer: Application Mailing Address = (default)  
(All Rate Payer correspondence is addressed to "Andrew Smith, 208 Greenhill Road, Eastwood 5063)

### Example .

Merge process when the "Merge From" and "Merge To" Names have **different** default mailing addresses.

#### *Merge TO Name Details*

Name : Andrew Smith  
Default Address : 208 Greenhill Road, Eastwood 5063  
Animal Owner : Application Mailing Address = (default)

#### *Merge FROM Name Details*

Name : A Smith

Default Address: 211 Flinders Street, Adelaide 5000

Property Owner : Application Mailing Address = c/o L J Hooker Real Estate.....

Rate Payer: Application Mailing Address = (default)

(All Rate Payer correspondence is addressed to "A Smith, 211 Flinders Street, Adelaide 5000)

## NAME MERGE

The Name Merge process has been modified (as of Release 3.06) to transfer information that is known on the "Merge From" Name(s) to the "Merge To" name where there is no recorded information.

Note that no known information on the "Merge To" name is replaced with information from the "Merge From" name(s).

Personal Name information that is transfer to the "Merge To" name when the value on the "Merge To" name is Null, Off or Unknown includes:

- Title
- Gender
- Deceased
- Private
- Date of Birth
- Person Category
- Preferred Delivery Method

Company Name information that is transfer to the "Merge To" name when the value on the "Merge To" name is Null, Off or Unknown includes:

- Government Identity
- Company Category
- Preferred Delivery Method

For Example:

- If the "Merge To" name does not have a Date of Birth value and any "Merge From" name(s) do have a Date of Birth value then this information is transferred to the "Merge To" name.
- If the "Merge To" name has an Unknown Gender and any "Merge From" name(s) do have a known Gender value then this information is transferred to the "Merge To" name
- If the "Merge To" name is not "Private" and any "Merge From" name(s) is "Private" then the "Merge To" name is made Private.

*Duplicate Name Maintenance Form*

### Merge To Name

The name appearing in this field is the name into which all selected names will be merged. Use the Select as Default button to select the name from the Available Names list to be moved to this field.

### Merge To Address

Displays the formatted address of a possible duplicate name record

### Detail Button

When the detail button is activated the system will display the Personal Name Enquiry form.

### Available Names

Displays the formatted name of a possible duplicate name record. This record may be selected to:-

1. Make the default name (into which other names would be merged)
2. Select the name to be moved into the Selected to Merge column. Once the merge process is executed all application roles would be merged into the default name and this name would be deleted from the name and address system.
3. Select the name to be deleted from the extract file.

### Formatted Address (Available Names)

Displays the formatted address of a possible duplicate name record.

### Detail Button

When the detail button is activated the system will display the Personal Name or Company Name Enquiry form.

### Duplicate Status

The Duplicate Status indicates whether the name record is a candidate for merging (Possible duplicate) or whether it has been changed to a Known Individual which will not be merged. The options available can be selected from the dropdown.

### Delete Button

This button will delete any selected name in the Available Names list. It does not delete the name from the name and address system.

This may be required if no names in the merge set required merging, to remove the merge set from the list.

### Selected for Merge Name

This field contains the formatted name of the name record to be merged into the default name. Once the merge process is executed all application roles from this name record will be merged into the default name record. This name record will be deleted from the name and address system.

**Selected for Merge Address**

Displays the formatted address of a duplicate name record.

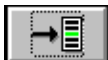
When the merge process is executed the address record is disassociated from the name record (which will be deleted). The address record is not deleted from the name and address system.

**Detail Button**

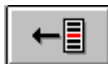
When the detail button is activated the system will display the Personal Name Enquiry form.

**Select as Default Button**

When activated this button will move the selected name in the Available Names list to the default name field.

**Select to Merge Button**

When activated this button will move the selected name in the Available Names list into the Selected to Merge list.

**Remove from List Button**

When activated this button will move the selected name from the Selected to Merge list to the Available Names list.

**Merge Button**

When activated this button will start the merge process. Any names in the Selected to Merge list will be merged with the Default Name.

## Duplicate Names Maintenance – Contacts

**Merging Names**

Merging of Names has also been modified to take into account Contact details.

Where a name that is being 'merged' has Contact details and they have been applied to the Default Address only and Roles using that Default Address, or where additional Contacts have been added and applied at various Role levels, then the following will occur:







Default Contact from 'merged' Name is added as a new Contact to the 'merge to' Name  
All Contacts that have been associated with a Role are added as new Contacts to the 'merge to' Name.

Roles from the 'merged' Name are linked to the 'merged to' name, retaining the Contact that was previously the 'default' or 'overrides', and now all linked as Role Contacts.

As part of Name Merge process, Name and Address Administrators must review all Contacts on the 'merged to' Name to ensure that they are still relevant and not duplicated and where necessary amend role addresses to point to the new Default Contact as required.

Example 1:

Name being Retained (Merge To Name)  
Default Contact was Att Mr J Citizen

Default Address Maintenance				
<b>Name Details</b>				
Formatted Name		ABC COMPANY		
<b>Default Address Details as at Date Effective</b>				
21-Jul-2005	Att: Mr J Citizen, 27 Greenhill Rd, WAYVILLE SA 5034		...	
<b>Application Name and Address Details (Current Role View)</b>				
Applicant  	Applicant	432/2000/AP1, 1 Williams Avenue, Appleton SA 5150	Current as of 22-Jul-2005	...
	Name / Contact	ABC COMPANY	(default) - Att: Mr J Citizen	...
	Address	(default)		...
Licencee  	Licencee	53/EDEV, "cont 1", 4 Warwick Avenue, Cooksville SA 5888	Current as of 22-Jul-2005	...
	Name / Contact	ABC COMPANY	(GENERAL) - Att: Ms M White	...
	Address	(default)		...
Property Owner  	Property Owner	7 Adams Lane, ADELAIDE SA 5001	Current as of 21-Jul-2005	...
	Name / Contact	ABC COMPANY	(No Contact)	...
	Address	(default)		...
<b>Search Profile</b>				
Role Type		<input type="text"/> <input type="text"/> <input type="button" value="»"/> <input type="text"/>		
<input type="button" value="Clipboard"/> <input type="button" value="Clipboard"/> <input type="button" value="Search"/> <input type="button" value="Insert"/> <input type="button" value="OK"/> <input type="button" value="Cancel"/>				

### Default Address Maintenance Form

Name being merged  
Default Contact was John Citizen

**Default Address Maintenance**

**Name Details**

Formatted Name: ABC COMPANY PTY LTD

**Default Address Details as at Date Effective**

22-Jul-2005 John Citizen, 27 Greenhill Rd, WAYVILLE SA 5034

**Application Name and Address Details (Current Role View)**

Applicant: CV/30/AAA, "Chris' House", 2 Grandview Drive, Hillbank SA 511; Current as of 22-Jul-2005

Name / Contact: ABC COMPANY PTY LTD; (GENERAL) - Mr F Black

Address: (default)

**Search Profile**

Role Type: [ ] [ ] >> [ ]

Clipboard Clipboard Search Insert OK Cancel

### Default Address Maintenance Form



After Merge Process:

Default Contact still Att Mr J Citizen

Mr Black added as a Contact and linked to the Role that was merged from the Merged Name

**Default Address Maintenance**

**Name Details**  
Formatted Name: ABC COMPANY

**Default Address Details as at Date Effective**  
21-Jul-2005 Att: Mr J Citizen, 27 Greenhill Rd, WAYVILLE SA 5034

**Application Name and Address Details (Current Role View)**

Applicant	Name / Contact	Address	Current as of	Details
432/2000/AP1, 1 Williams Avenue, Appleton SA 5150	ABC COMPANY	(default)	22-Jul-2005	(default) - Att: Mr J Citizen
CV/30/AAA, "Chris' House", 2 Grandview Drive, Hillbank SA 5111	ABC COMPANY	(default)	22-Jul-2005	(GENERAL) - Mr F Black
53/EDEV, "cont 1", 4 Warwick Avenue, Cooksville SA 5888	ABC COMPANY	(default)	22-Jul-2005	(GENERAL) - Att: Ms M White

**Search Profile**  
Role Type: [ ] [ ] >> [ ]

☐ Clipboard  
☐ Clipboard

Search Insert OK Cancel

*Default Address Maintenance Form*

Example 2:

Where the Default on the Merged Name has been applied to a Role.

**Default Address Maintenance**

**Name Details**  
Formatted Name: ABC COMPANY PTY LTD

**Default Address Details as at Date Effective**  
22-Jul-2005 John Citizen, 27 Greenhill Rd, WAYVILLE SA 5034

**Application Name and Address Details (Current Role View)**

Applicant	Name / Contact	Address	Current as of
CV/14/AAA, 121-129 King William Street, ADELAIDE SA 5001	ABC COMPANY PTY LTD	(default)	22-Jul-2005 (default) - John Citizen

**Search Profile**  
Role Type: [ ] [ ] >> [ ]

☐ Clipboard  
☐ Clipboard

Search Insert OK Cancel

Default Address Maintenance Form

## After Merge Process

Role from Merged Name still retains the Contact of John Citizen, but it is no longer the Default Contact

**Default Address Maintenance**

**Name Details**  
Formatted Name: ABC COMPANY

**Default Address Details as at Date Effective**  
21-Jul-2005 Att: Mr J Citizen, 27 Greenhill Rd, WAYVILLE SA 5034

**Application Name and Address Details (Current Role View)**

Applicant	Name / Contact	Address	Current as of
CV/14/AAA, 121-129 King William Street, ADELAIDE SA 5001	ABC COMPANY	(default)	22-Jul-2005 (CEO) - John Citizen
432/2000/AP1, 1 Williams Avenue, Appleton SA 5150	ABC COMPANY	(default)	22-Jul-2005 (default) - Att: Mr J Citizen
CV/30/AAA, "Chris' House", 2 Grandview Drive, Hillbank SA 5111	ABC COMPANY	(default)	22-Jul-2005 (GENERAL) - Mr F Black

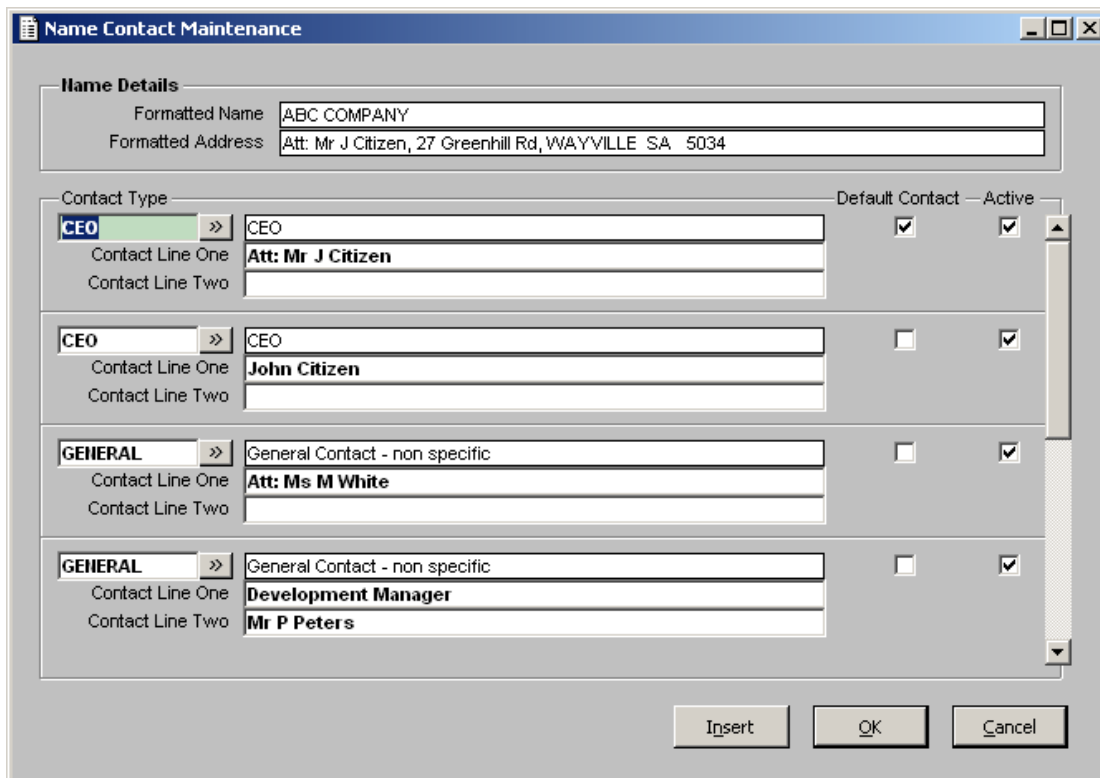
**Search Profile**  
Role Type: [ ] [ ] >> [ ]

☐ Clipboard  
☐ Clipboard

Search Insert OK Cancel

Default Address Maintenance Form

The result of the Contact Types for the 'Merge To' Name, will be a combined list of Contacts, which must be reviewed and amended, where required.



The screenshot shows a software window titled "Name Contact Maintenance". It contains a "Name Details" section with fields for "Formatted Name" (ABC COMPANY) and "Formatted Address" (Att: Mr J Citizen, 27 Greenhill Rd, WAYVILLE SA 5034). Below this is a list of contact types. Each entry has a "Contact Type" dropdown, "Contact Line One", "Contact Line Two", and checkboxes for "Default Contact" and "Active".

Contact Type	Contact Line One	Contact Line Two	Default Contact	Active
CEO	CEO	Att: Mr J Citizen	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
CEO	CEO	John Citizen	<input type="checkbox"/>	<input checked="" type="checkbox"/>
GENERAL	General Contact - non specific	Att: Ms M White	<input type="checkbox"/>	<input checked="" type="checkbox"/>
GENERAL	General Contact - non specific	Development Manager Mr P Peters	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Buttons at the bottom: Insert, OK, Cancel.

Name Contact Maintenance Form

## Duplicate Address Component Merge

This function enables Address Components to be merged.

The steps required to merge duplicate Address Components are as follows:

- All duplicate property streets must be merged using the Street Amalgamation menu option from the Property Administration/Street Networks Menu.
- All Address Components that are not referenced by an Address should be removed using the Address Component Clean Up menu option from the Name and Address/Name and Address System Housekeeping menu.
- Select Duplicate Address Component Merge from the Name and Address System Housekeeping menu.
- Select the Component you wish to merge.
- Scroll through the available Components section to detect any duplicate Address Components.
- Always move the (Property Address) Component into the "Merge to" section, if one exists in the duplicate set, as it is not possible to move a (Property Address) Component to the "Selected for Merge" area frame.
- If a (Property Address) Component does not exist in the duplicate set, then move the Address Component with the largest number of dependent addresses into the "Merge to" section as this will reduce the number of address rebuilds required. (The number of addresses dependent on an address component can be determined by using the "... " button adjacent to the appropriate component. This button can also be used to verify whether address components are true duplicates, i.e.: Alberton (QLD 4207), Alberton (SA 5014), and Alberton (VIC 3971) should not be merged into a single component.)
- Move all duplicate Address Components into the "Selected for Merge" section and use the "Merge" button to update all the addresses using these components to the single "Merge to" component.

### Duplicate Address Component Maintenance Form

*Duplicate Address Component Maintenance Form*

#### Merge to Street/Suburb/etc

This field displays the address component selected to which to merge duplicate address components. The detail button invokes the Address Component Usage Selection Form which displays formatted addresses linked to the selected component.

#### Available Components

These fields display a complete list of components from which to make a selection. The detail button next to each component invokes the Address Component Usage Selection Form which can be used to maintain the addresses which use the selected component.

### Selected for Merge

Available Components can be selected for merging by using the Select Button to move them to the Selected for Merge side. The detail button next to each component invokes the Address Component Usage Selection Form which can be used to maintain the addresses which use the selected component

### Select Default Button

The Select Default Button can be used to move the selected address component to the “Merge to” area at the top of the form.

### Select Button

The Select Button can be used to move selected address components from the “Available” side to the “Selected” side.

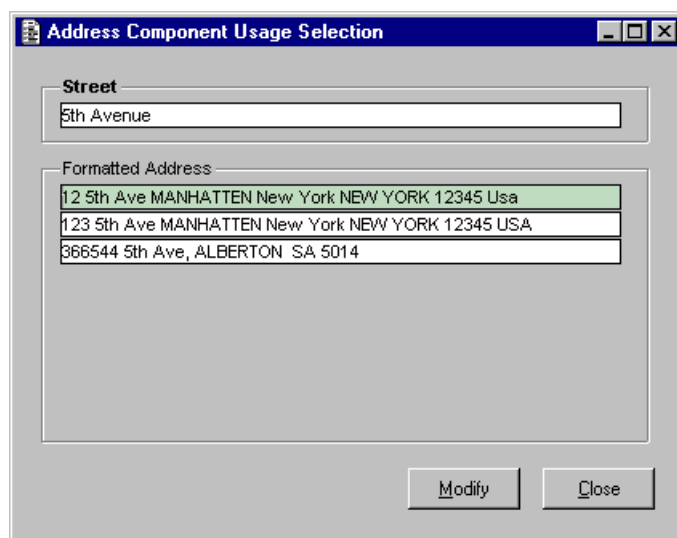
### Remove Button

The Remove Button can be used to move Selected address components back from the “Selected” side to the “Available” side.

### Search Profile

Enter an address component in this field and select the Search Button. This will perform a search on Available Components. It is useful when there are more than 9 components in the list. This field is case insensitive. Wildcard searching is available.

## Address Component Usage Selection Form



*Address Component Usage Selection Form*

### Component (Street/Suburb etc)

This field displays the selected address component.

### Formatted Address

This field displays a list of formatted addresses which use the above component.

## Name Details Extract

The Name Details Extraction function enables all Name and Address details to be extracted into a database table. This database table can then be exported to third party tools, such as Microsoft Excel, to produce Mailing Labels.

The extracted Name and Address details are stored in the CRPNA04 reporting entity.

The extracted Communication and Information details are stored in the CRPNA05 reporting entity.

The Query Export/Import Format Maintenance option can then be used to view the fields that are extracted into these tables.

The extraction can be based on Names or Application Role Linkages.

### Name Based Extraction Example

To produce a Phone List of all Names within the System, all Names details can be extracted based on the selection profile.

**Note:** The address, information and communication details are not extracted on Personal Private Names when the Private Details extraction option has not been selected.

Communication and Information Types to Extract	
After Hours Number	Person & Company Communication Type
Alternate Phone Number	Personal Name Communication Type
Business Phone Number	Person & Company Communication Type
Company Phone Number	Company Name Communication Type
DX Address	Person & Company Communication Type
E-Mail Address (Home)	Person & Company Communication Type
E-Mail Address (Work)	Person & Company Communication Type
Emergency Phone Number	Person & Company Communication Type

### Application Role Linkages Based Extraction Example

Only names with a "Current" linkage to the selected Role Type are extracted.

The Mailing Label fields include any other name details also linked to the application entity.

Extract Duplicate Name options:

Off      A Name is only extracted for the first Role record it is linked to.

On            A Name is extracted for each Role record it is linked to.

Extract Duplicate Application Entities options:

1. Off        An Application Entity is only extracted once regardless of the number of names linked to it.
2. On        An Application Entity is extracted for each name that is linked to it.

If an extract file needs to be produced to create mailing labels to notify all Property Owners:  
Set Role Type to "LPA 0 Property Owner"

If only one mailing label is to be produced for each property regardless of the number of individual owners:  
Set Extract Duplicate Application Entities to OFF.

If a Person or Company owns multiple properties and only one mailing label is required per owner:  
Set Extract Duplicate Names to OFF.

**Name Extract Control**

**Search Profile**

Surname or Company

Given Names

Name Type **Person & Company** ▼

**Details to Extract**

Private Details ☒

Role Type **LPA 0** **Property Owner** >>

Extract Duplicate Names ☐ Extract Duplicate Application Entities ☐

**Communication and Information Types to Extract**

After Hours Number	Person & Company Communication Type
Alternate Phone Number	Personal Name Communication Type
Business Phone Number	Person & Company Communication Type
Company Phone Number	Company Name Communication Type
DX Address	Person & Company Communication Type
E-Mail Address (Home)	Person & Company Communication Type
E-Mail Address (Work)	Person & Company Communication Type
Emergency Phone Number	Person & Company Communication Type

**Application Role Query Result**

Description  >>

Options Process Close

## Name Extract Control Form

This form enables Name and Address details to be extracted into a database table. This database table can then be exported to third party tools, such as Microsoft Excel, to produce Mailing Labels.

Name Extract Control Form

**Search Profile – Surname or Company**

Enter the Surname or Company Name you wish to extract. Wildcard searching is available in this field. If this field is left blank, then ALL Name and Address details will be extracted.

**Search Profile – Given Names**

Enter the Given Names you wish to extract. Wildcard searching is available in this field.

**Search Profile – Name Type**

Select a Name Type from the dropdown list. The options are:

Company Name

Personal Name

Person and Company

The default option is 'Person and Company'

**Details to Extract – Private Details**

Select this option to include, in the extraction, details on Personal Private Names. The address, information and communication details are not extracted on Personal Private Names when the Private Details extraction option has not been selected.

**Role Type**

Select a Role Type from the Pop Up list if you wish to base your extraction on Application Role Linkages. Only names with a "Current" linkage to the selected Role Type will be extracted.

**Extract Duplicate Names**

Extract Duplicate Name options:

Off A Name is only extracted for the first Role record it is linked to.

On A Name is extracted for each Role record it is linked to.

E.g.. If a Person or Company owns multiple properties and only one mailing label is required per owner, then this option should be set to OFF.



**Extract Duplicate Application Entities**

Extract Duplicate Application Entities options:

- 3. Off      An Application Entity is only extracted once regardless of the number of names linked to it.
- 4. On      An Application Entity is extracted for each name that is linked to it.

E.g.. If only one mailing label is to be produced for each property regardless of the number of individual owners then this option should be set to OFF

**Communication and Information Types to Extract**

These fields display Communication and Information Types which can be selected for extraction.

**Name Query Result – Description**

This field allows a query result to be entered on which to base your extraction. Alternatively, a query result can be selected from the Pop Up.

# Audit Set Report

The Audit Set Report function has been provided to enable database modifications across a set of related tables to be reported as a single unit.

The only Audit Set that can be defined in Release 2.14 is for the Name and Address system and can be used to report database modifications that affect a single Name and/or multiple Names.

For Example:

1) A "Phone Number" modification affects a single Name.

The Audit Set Report will detail the modification to the "Phone Number" and the Name that was affected.

2) A "Surname" modification affects a single Name and all the Role Linkages for the Name.

The Audit Set Report will detail the modification to the "Surname" and all the Role Linkages that were affected.

3) An "Address" modification can affect many Names.

The Audit Set Report will detail the modification to the "Address" and all the Names that use the "Address" as a Default Address and all the Names that have a Role Linkage that use the "Address" as an override.

4) A "Personal Name Title" modification can affect many Names.

The Audit Set Report will detail the modification to the "Personal Name Title" and all the Names that use the "Personal Name Title".

The Audit Set Report function does not capture any additional information into the Audit table, (CAUAUDT), but is reliant on all Name and Address Entities being audited.

The Audit Set Report function consists of the "Audit Set Maintenance" and "Audit Set Report" menu options.

The sections below describe how to establish a comprehensive Audit facility to track all modifications to the Name and Address system.

## Establishing a Name and Address Audit Set

The Audit Set Maintenance menu option is used to define what database modifications to "Name and Address" tables are to be reported.

In order to define an Audit Set for the Name and Address application all Name and Address Entities need to be audited.

I.e.:

Select the "Auditing >> Audit Model Maintenance" menu option and ensure that the "CNA Name and Address" Model has been selected.

Select the "Detail" button adjacent to the "CNA Name and Address" entry and ensure that all "CNA" tables have been selected.

I.e.:

**Audit Entity Parameter Maintenance**

Model: CNA Name and Address

**Do Not Audit**

**Audit**

CNAADDR	Address	...
CNAADRL	Address Line	...
CNAACASE	Case Conversion Exception	...
CNACATG	Name Category	...
CNACCOM	Company Communication	...
CNACINF	Company Information	...
CNACMPT	Address Component Type	...
CNACOMP	Address Component	...
CNACOMT	Communication Type	...
CNACPNY	Company Name	...
CNAIDTA	Default Address	...

**Search Profile**

Entity Name:

Search OK Cancel

### Audit Set Maintenance

The establishment of an Audit Set can best be described with a fully functional example.

It is recommended that you adopt this example as an initial base and perform any adjustments after viewing the resultant reports.

Select the “Auditing >> Audit Set Maintenance” menu option and create a new Audit Set called “All Name and Address Modifications”.

I.e.:

**Audit Set Maintenance**

Entity: CNAIDTY Name

**Audit Set**

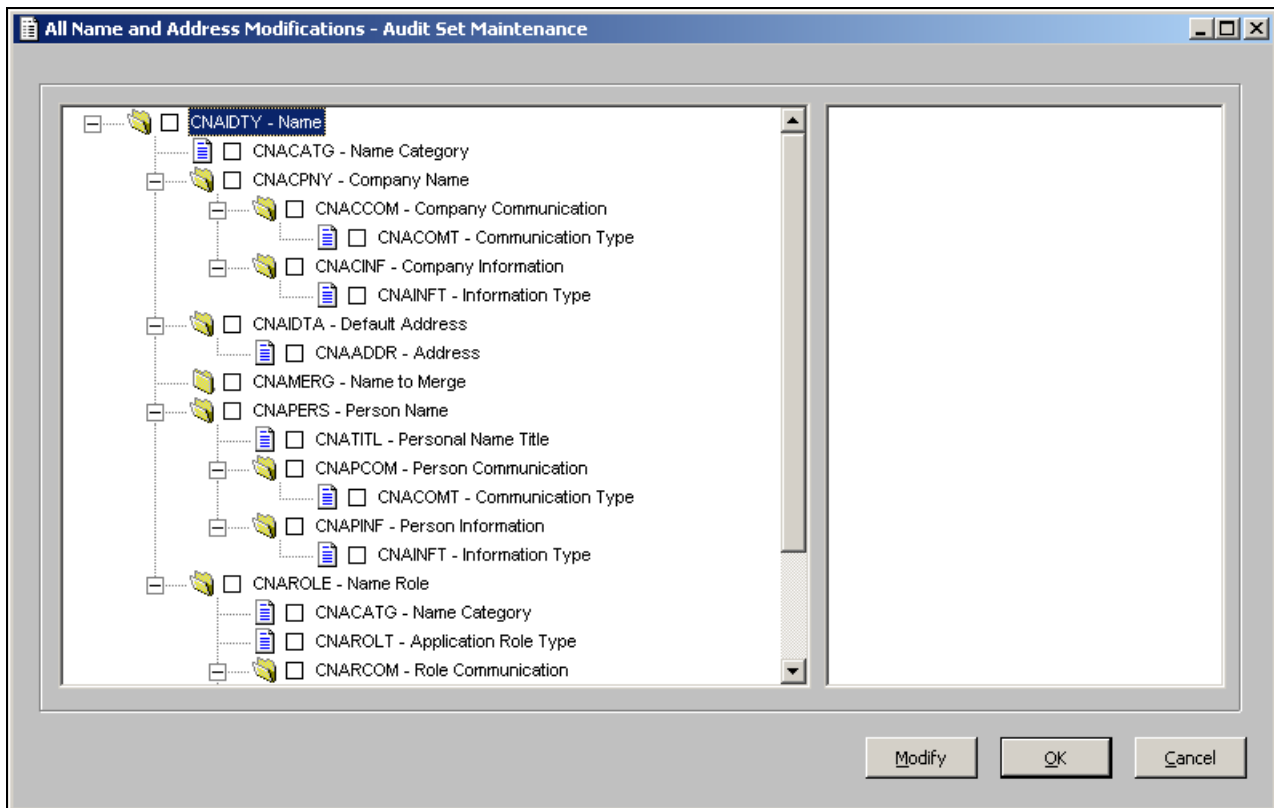
All Name and Address Modifications

Insert OK Cancel

Select the “Detail” button adjacent to the newly created Audit Set to define what modifications are to be reported.

Click the “+” adjacent to the “CNAIDTY – Name” entry to display the entire Name and Address relationship structure.

I.e.:



The Tree on the left hand side of the form displays the relationships between the Name and Address entities. A "tick" in the box adjacent to an entity indicates that fields have been selected for this entity and will be reported.

The List on the right hand side of the form displays the fields that have been selected for the highlighted entity.

Initially no fields will be selected and therefore all the entity boxes will not be "ticked" and the right hand side field list will be empty for all entities.

Highlight the "CNAIDTY – Name" entity with a single left mouse click and select the [Modify] button to select the fields for the entity.

I.e.:

Entity: CNAIDTY    Name: \_\_\_\_\_

**Fields not to Report**

TPKCNAIDTY	Name Key
NAMETYPE	Name Type
SORTNAME	Search Name
SORTGNAME1	Given Names
SORTGNAME2	Given Names
PHONETIC	Phonetic
FORMATNAME	Formatted Name
SALUTATION	Mailing Salutation
ACTIVE	Active
TFKCNACATG	Name Category

**Fields to Report**

**Report Field Details**

OK    Cancel

The “Fields not to Report” frame contains the fields on the entity that will not be reported when a record is created, deleted or updated.

The “Fields to Report” frame contains the fields on the entity that will be reported when a record is created, deleted or updated.

Use the [Select One] button to move the following fields to the “Fields to Report” frame:

- FORMATNAME – Formatted Name
- NAMETYPE – Name Type
- SALUTATION – Mailing Salutation
- ACTIVE - Active
- TFKCNACATG – Name Category

I.e.:

Entity: CNAIDTY Name:

**Fields not to Report**

TPKCNAIDTY	Name Key
SORTNAME	Search Name
SORTGNAME1	Given Names
SORTGNAME2	Given Names
PHONETIC	Phonetic

**Fields to Report**

FORMATNAME	Formatted Name
NAMETYPE	Name Type
SALUTATION	Mailing Salutation
ACTIVE	Active
TFKCNACATG	Name Category

**Report Field Details**

Report Field (FORMATNAME - Formatted Name)

- If record Created
- If record Deleted
- If record Update

OK Cancel

There is no point in selecting the TPKCNAIDTY, SORTNAME, SORTGNAME1, SORTGNAME2 and PHONETIC fields as these fields are system generated and cannot be directly maintained by users.

For Example:

If a "Surname" value on a Personal Name is modified then the SORTNAME field will also be modified. There is no point in reporting the SORTNAME modification as the modification will be reported in the FORMATNAME field and also the SURNAME field on the CNAPERS entity.

The "Report Field Details" frame contains the reporting attributes for the field highlighted in the "Fields to Report" frame and avoids the need to use the [Detail] button to view the attributes selected for the field.

Select the [Detail] button adjacent to the "FORMATNAME – Formatted Name" field in the "Report Field Details" frame to define the reporting attributes.

I.e.:

**All Name and Address Modifications - Audit Set Field Maintenance**

**Report Field**

Entity: CNAIDTY      Name: \_\_\_\_\_

Field: FORMATNAME      Formatted Name: \_\_\_\_\_

☒ If record Created     
 ☒ If record Deleted     
 ☐ If record Update     
 ☒ If value Changed

**Entity Link**

Fields not to Report: \_\_\_\_\_

Fields to Report: \_\_\_\_\_

OK      Cancel

The check boxes within the “Report Field” frame indicate when the field should be reported.

The “If record Created” check box indicates that the field will be reported when a new record is added to the entity.

The “If record Deleted” check box indicates that the field will be reported when a record is deleted from the entity.

The “If record Updated” check box indicates that the field will be reported when a record is updated in the entity regardless of whether the value of the specific field is changed.

The “If value Changed” check box indicates that the field will be reported when a record is updated in the entity and the value of this specific field is changed.

The “If record Updated” and “If value Changed” indicators are dependent on each other as the “If value Changed” indicator is irrelevant when the “If record Updated” indicator is checked on. Checking on the “If record Updated” indicator will automatically check off the “If value Changed” indicator. Checking off both the “If record Updated” and “If value Changed” indicators will mean that the field is not reported when a record is updated.

At least one “Report Field” attribute needs to be selected as there is no point in the field being selected if it will not be reported under any database modification condition.

The “Entity Link” frame is only relevant to Foreign Key fields and explained under the TFKCNACATG field attributes definition section below.

The following attributes should be selected for the CNAIDTY fields.

FORMATNAME- Formatted Name

**All Name and Address Modifications - Audit Set Field Maintenance**

**Report Field**

Entity: CNAIDTY    Name: \_\_\_\_\_

Field: FORMATNAME    Formatted Name: \_\_\_\_\_

☒ If record Created    ☒ If record Deleted    ☐ If record Update    ☒ If value Changed

**Entity Link**

**Fields not to Report**

**Fields to Report**

OK    Cancel

## NAMETYPE – Name Type

**All Name and Address Modifications - Audit Set Field Maintenance**

**Report Field**

Entity: CNAIDTY    Name: \_\_\_\_\_

Field: NAMETYPE    Name Type: \_\_\_\_\_

☒ If record Created    ☒ If record Deleted    ☐ If record Update    ☒ If value Changed

**Entity Link**

**Fields not to Report**

**Fields to Report**

OK    Cancel

## SALUTATION - Mailing Salutation



**All Name and Address Modifications - Audit Set Field Maintenance**

**Report Field**

Entity: CNAIDTY    Name: [ ]  
Field: SALUTATION    Mailing Salutation: [ ]

☒ If record Created    ☒ If record Deleted    ☐ If record Update    ☒ If value Changed

**Entity Link**

**Fields not to Report**    **Fields to Report**

[ ]    [ ]

OK    Cancel

ACTIVE – Active

**All Name and Address Modifications - Audit Set Field Maintenance**

**Report Field**

Entity: CNAIDTY    Name: [ ]  
Field: ACTIVE    Active: [ ]

☒ If record Created    ☒ If record Deleted    ☐ If record Update    ☒ If value Changed

**Entity Link**

**Fields not to Report**    **Fields to Report**

[ ]    [ ]

OK    Cancel

TFKCNACATG – Name Category

**All Name and Address Modifications - Audit Set Field Maintenance**

**Report Field**

Entity: CNAIDTY Name:

Field: TFKCNACATG Name Category:

☒ If record Created ☒ If record Deleted ☐ If record Update ☒ If value Changed

**Entity Link**

Entity: CNACATG Name Category:

**Fields not to report**

TPKCNACATG	Name Category
APPLIESTO	Applies To
CDECNACATG	Name Category
ACTIVE	Active

**Fields to Report**

DESCR	Description
-------	-------------

Move

OK Cancel

The TFKCNACATG field is a foreign key to the Name Category entity CNACATG.

The "Entity Link" frame allows for the optional selection of CNACATG fields to be reported in association with a TFKCNACATG value.

For Example:

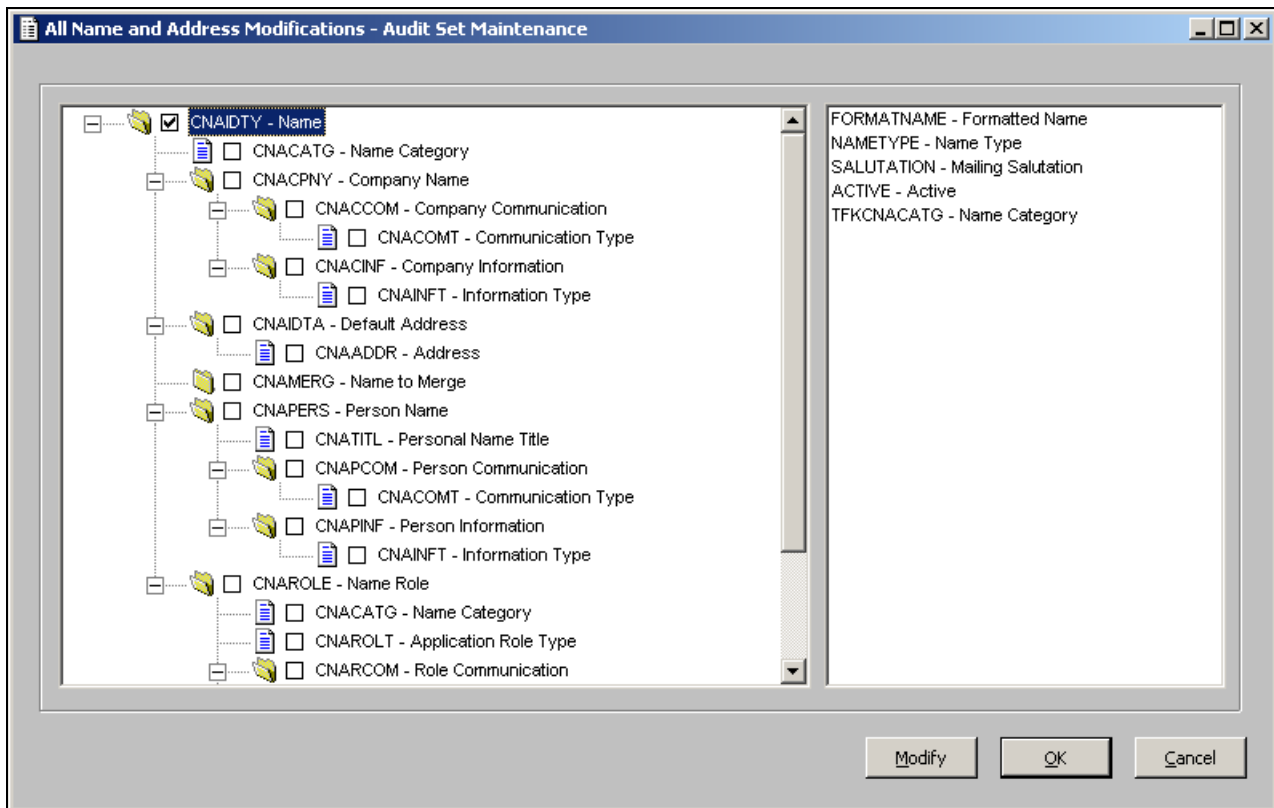
If the Name Category on a Company Name is changed from "Propriety Limited" to "Publicly Listed" then the Audit Set report will show a change in TFKCNACATG from say 3 to 5.

The inclusion of the DESCR field from the CNACATG entity will report that the TFKCNACATG value has been changed from "Propriety Limited" to "Publicly Listed" in conjunction with the actual TFKCNACATG change.

The following table summarizes what fields and attributes should be selected for CNAIDTY – Name

Entity Path: CNAIDTY					
Report Field	If record Created	If record Deleted	If Record Updated	If value Changed	Entity Link Fields to Report
FORMATNAME	Yes	Yes	No	Yes	
NAMETYPE	Yes	Yes	No	Yes	
SALUTATION	Yes	Yes	No	Yes	
ACTIVE	Yes	Yes	No	Yes	
TFKCNACATG	Yes	Yes	No	Yes	DESCR

The result of defining the CNAIDTY- Name reporting field is shown below.

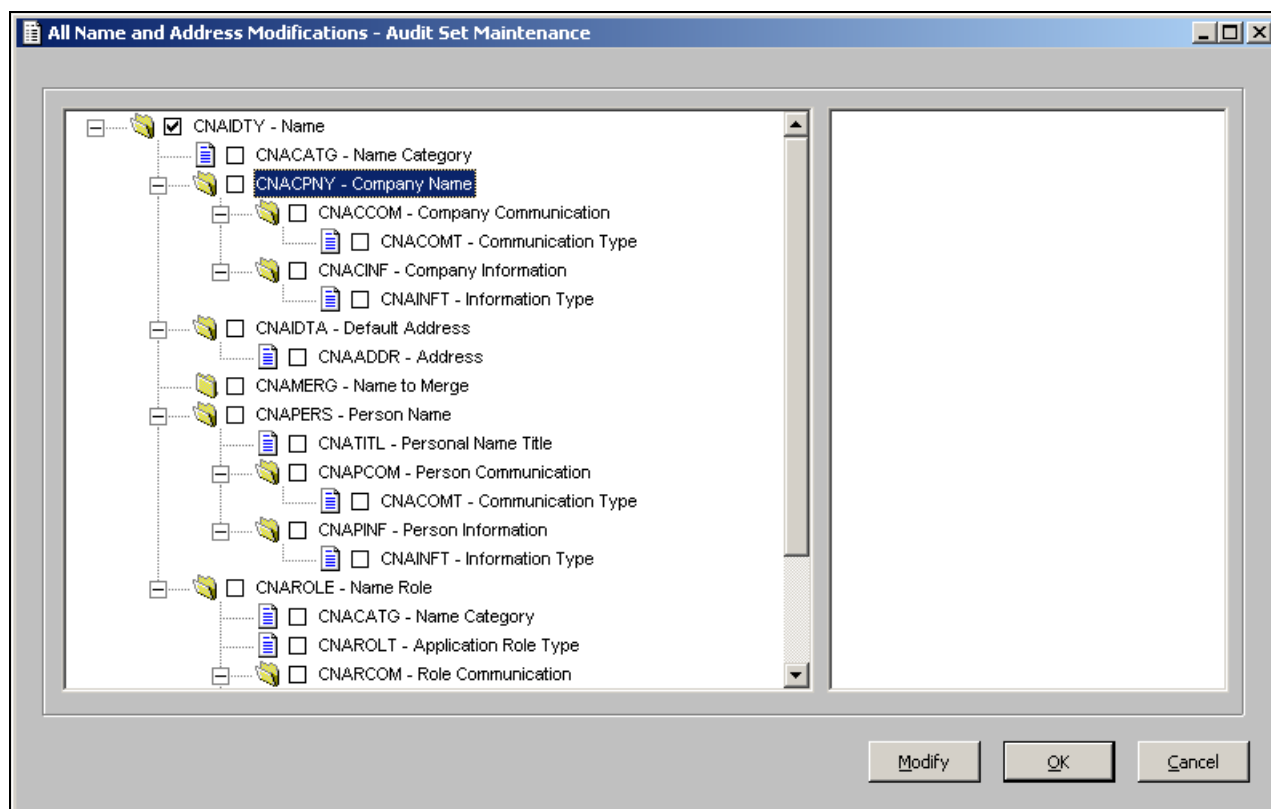


Note that the box adjacent to the CNAIDTY – Name entity has been “ticked” and the right hand side list contains the selected fields.

Define the report fields for the CNACPNY – Company Name entity.

Highlight the “CNACPNY – Company Name entity and select the [Modify] button.

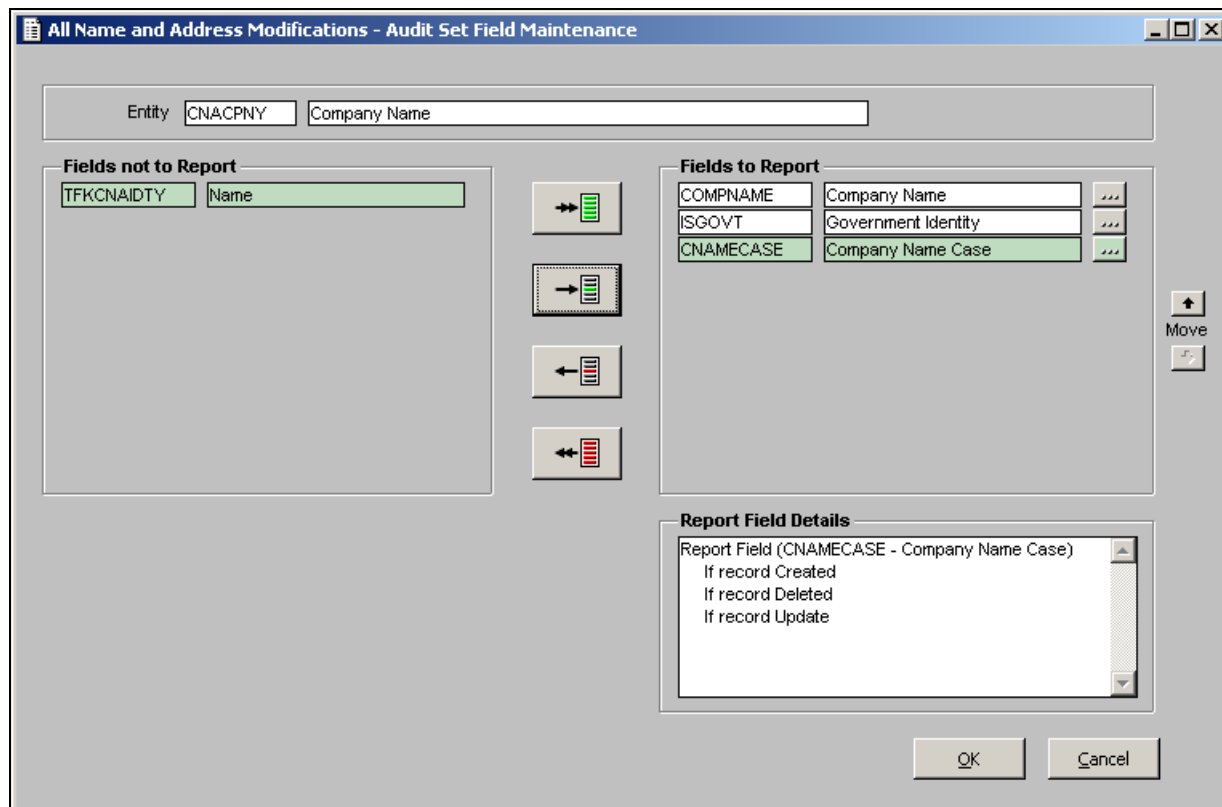
I.e.:



Use the [Select One] button to move the following fields to the "Fields to Report" frame:

COMPNAME – Company Name  
 ISGOVT – Government Identity  
 CNAMECASE – Company Name Case

I.e.:



Select the [Detail] button adjacent to each field in the “Report Field Details” frame to define the reporting attributes.

The following attributes should be selected for the CNACPNY fields.

COMPNAME – Company Name

**All Name and Address Modifications - Audit Set Field Maintenance**

**Report Field**

Entity	CNACPNY	Company Name
Field	COMPNAME	Company Name

☒ If record Created    ☒ If record Deleted    ☐ If record Update    ☒ If value Changed

**Entity Link**

**Fields not to Report**

**Fields to Report**

OK Cancel

ISGOVT – Government Identity

**All Name and Address Modifications - Audit Set Field Maintenance**

**Report Field**

Entity	CNACPNY	Government Identity
Field	ISGOVT	Government Identity

☒ If record Created    ☒ If record Deleted    ☐ If record Update    ☒ If value Changed

**Entity Link**

**Fields not to Report**

**Fields to Report**

OK Cancel

CNAMECASE – Company Name Case

The following table summarizes what fields and attributes should be selected for CNACPNY – Company Name

Entity Path: CNAIDTY > CNACPNY					
Report Field	If record Created	If record Deleted	If Record Updated	If value Changed	Entity Link Fields to Report
COMPNAME	Yes	Yes	No	Yes	
ISGOVT	Yes	Yes	No	Yes	
CNAMECASE	Yes	Yes	No	Yes	

### Audit Set Entities to Select

Generally there is no need to define reporting fields for parameter entities as the maintenance of these entities is limited to the application administrator and their content is modified very infrequently. The impact of modifying a parameter entity can result in thousands of Names being reported.

For Example:

If the “CNATITL – Personal Name Title” is included in the Audit Set then a modification to a Personal Name Title from “MR” to “Mr” would result in every personal name that has a “MR” title being reported.

When an application administrator modifies a parameter entity a “Rebuild” function is often required to apply the new parameter setting to the application entities.

i.e. In order to apply a modified Personal Name Title to all formatted names that use the Title a “Rebuild Formatted Names” function needs to be performed.

These “Rebuild” functions will update the relevant master files that will be reported in the Audit Set.

### “All Name and Address Modifications” Audit Set Definition

The following tables indicate what entities and fields should be selected to define a complete Audit Set for the Name and Address application.

As previously stated it is recommended that you adopt this example as an initial base and perform any adjustments after viewing the resultant reports.

Entity Path: CNAIDTY
----------------------

Report Field	If record Created	If record Deleted	If Record Updated	If value Changed	Entity Link Fields to Report
FORMATNAME	Yes	Yes	No	Yes	
NAMETYPE	Yes	Yes	No	Yes	
SALUTATION	Yes	Yes	No	Yes	
ACTIVE	Yes	Yes	No	Yes	
TFKCNACATG	Yes	Yes	No	Yes	DESCR

Entity Path: CNAIDTY > CNACPNY					
Report Field	If record Created	If record Deleted	If Record Updated	If value Changed	Entity Link Fields to Report
COMPNAME	Yes	Yes	No	Yes	
ISGOVT	Yes	Yes	No	Yes	
CNAMECASE	Yes	Yes	No	Yes	

Entity Path: CNAIDTY > CNACPNY > CNACCOM					
Report Field	If record Created	If record Deleted	If Record Updated	If value Changed	Entity Link Fields to Report
DESCR	Yes	Yes	Yes	No	
TFKCNACOMT	Yes	Yes	Yes	No	COMMTYPE
COMPANYSEQ	Yes	Yes	No	Yes	

Entity Path: CNAIDTY > CNACPNY > CNACINF					
Report Field	If record Created	If record Deleted	If Record Updated	If value Changed	Entity Link Fields to Report
DESCR	Yes	Yes	Yes	No	
TFKCNAINFT	Yes	Yes	Yes	No	INFOTYPE
COMPANYSEQ	Yes	Yes	No	Yes	

Entity Path: CNAIDTY > CNAIDTA					
Report Field	If record Created	If record Deleted	If Record Updated	If value Changed	Entity Link Fields to Report
DATEEFFECT	Yes	Yes	Yes	No	
TFKCNAAADDR	Yes	Yes	Yes	No	FORMATADDR

Entity Path: CNAIDTY > CNAIDTA > CNAADDR					
Report Field	If record Created	If record Deleted	If Record Updated	If value Changed	Entity Link Fields to Report
FORMATADDR	Yes	Yes	No	Yes	

Entity Path: CNAIDTY > CNAPERS					
Report Field	If record Created	If record Deleted	If Record Updated	If value Changed	Entity Link Fields to Report
TFKCNATITL	Yes	Yes	No	Yes	TITLE
SURNAME	Yes	Yes	No	Yes	
GIVENNAME	Yes	Yes	No	Yes	
GENDER	Yes	Yes	No	Yes	
BIRTHDATE	Yes	Yes	No	Yes	
ISDECEASED	Yes	Yes	No	Yes	
ISPRIVATE	Yes	Yes	No	Yes	
SNAMECASE	Yes	Yes	No	Yes	
GNAMECASE	Yes	Yes	No	Yes	

Entity Path: CNAIDTY > CNAPERS > CNAPCOM					
Report Field	If record Created	If record Deleted	If Record Updated	If value Changed	Entity Link Fields to Report
DESCR	Yes	Yes	Yes	No	
TFKCNACOMT	Yes	Yes	Yes	No	COMMTYPE
PERSONSEQ	Yes	Yes	No	Yes	

Entity Path: CNAIDTY > CNAPERS > CNAPINF					
Report Field	If record Created	If record Deleted	If Record Updated	If value Changed	Entity Link Fields to Report
DESCR	Yes	Yes	Yes	No	
TFKCNAINF	Yes	Yes	Yes	No	INFOTYPE
PERSONSEQ	Yes	Yes	No	Yes	

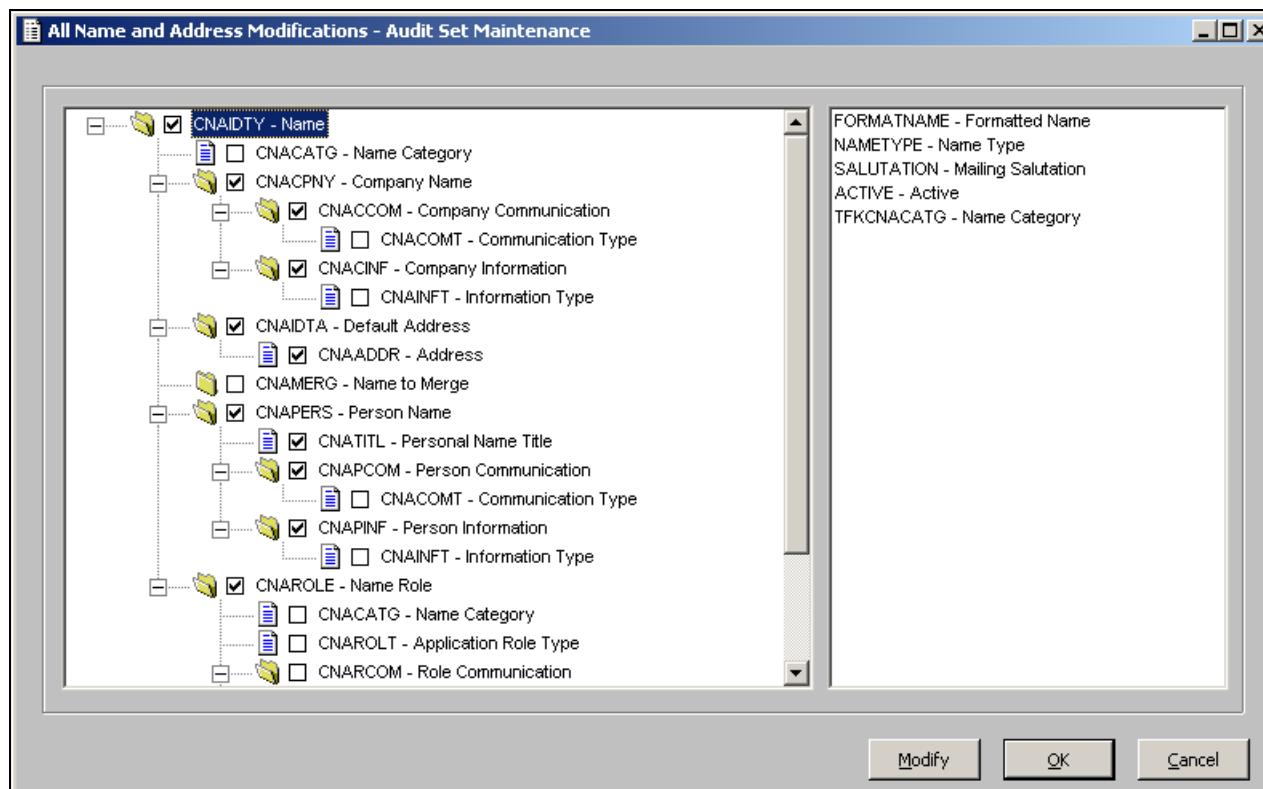
Entity Path: CNAIDTY > CNAROLE					
Report Field	If record Created	If record Deleted	If Record Updated	If value Changed	Entity Link Fields to Report
FKCNAROLTA	Yes	Yes	Yes	No	
FKCNAROLTN	Yes	Yes	Yes	No	DESCR
TFKAPPL	Yes	Yes	Yes	No	Calling Application Entity
STATUS	Yes	Yes	Yes	No	
FORMATNAME	Yes	Yes	No	Yes	
NAMEFORMAT	Yes	Yes	No	Yes	
CREATEDATE	Yes	Yes	No	Yes	
HISTDATE	Yes	Yes	No	Yes	

Entity Path: CNAIDTY > CNAROLE > CNAROLA					
Report Field	If record Created	If record Deleted	If Record Updated	If value Changed	Entity Link Fields to Report
DATEEFFECT	Yes	Yes	Yes	No	
TFKCNAADDR	Yes	Yes	Yes	No	FORMATADDR
ISACTIVE	Yes	Yes	No	Yes	

Entity Path: CNAIDTY > CNAROLE > CNAROLA > CNAADDR					
Report Field	If record Created	If record Deleted	If Record Updated	If value Changed	Entity Link Fields to Report
FORMATADDR	Yes	Yes	No	Yes	

The result of defining all the reporting fields specified is shown below.





Use the Scroll Bar to ensure that the CNAROLA and CNAADDR entities are also “Ticked”

### **Audit Set Report**

It is envisaged that the Audit Set Report will be executed periodically through the standard End of Day scheduling.

The “From Previous Report” indicator on the Audit Set Report Control form provides the ability to report all modifications that have occurred since the report was previously produced.

In order for the “From Previous Report” function to operate a report must be produced to provide an initial starting point.

### **Initial Starting Point Production**

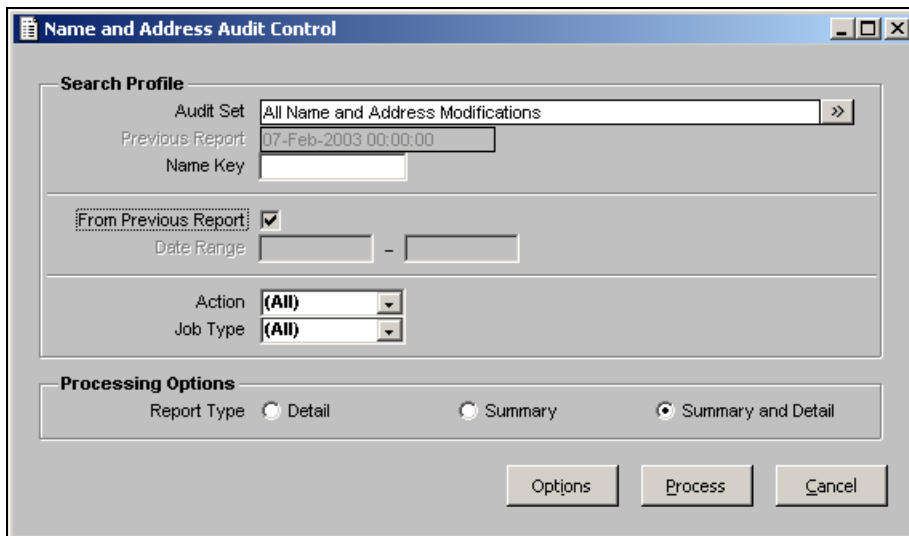
Select the “Auditing >> Audit Set Report” menu option.

Select the Audit Set [Pop Up] button to select the “All Name and Address Modifications” previously defined Audit Set.

The “Previous Report” will automatically default to the current date without a time as no report has been previously produced.

Check the “From Previous Report” indicator.

i.e.



The dialog box is titled "Name and Address Audit Control". It contains the following sections:

- Search Profile**
  - Audit Set: A dropdown menu showing "All Name and Address Modifications" with a right-pointing arrow button.
  - Previous Report: A text box containing "07-Feb-2003 00:00:00".
  - Name Key: An empty text box.
- From Previous Report:** A checkbox that is checked.
- Date Range:** Two empty text boxes separated by a hyphen.
- Action:** A dropdown menu showing "(All)".
- Job Type:** A dropdown menu showing "(All)".
- Processing Options**
  - Report Type: Three radio buttons labeled "Detail", "Summary", and "Summary and Detail". The "Summary and Detail" radio button is selected.
- Buttons: "Options", "Process", and "Cancel" at the bottom right.

Select the "Process" button and execute the report interactively to report all Name and Address modifications that have occurred during the current day.

### End of Day Scheduling

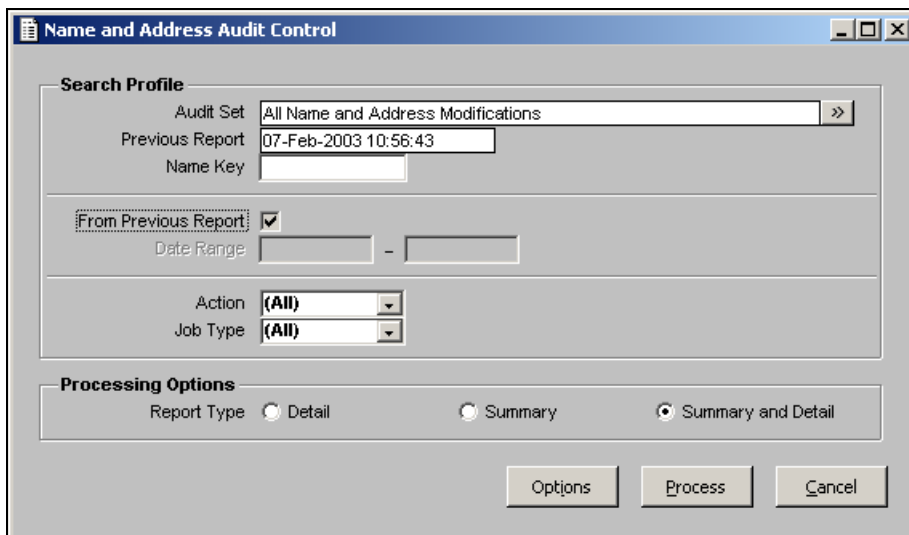
Select the "Auditing >> Audit Set Report" menu option

The "Previous Report" will automatically default to the date and time at which the report was previously produced.

Select the Audit Set [Pop Up] button to select the "All Name and Address Modifications" previously defined Audit Set.

Check the "From Previous Report" indicator.

i.e.

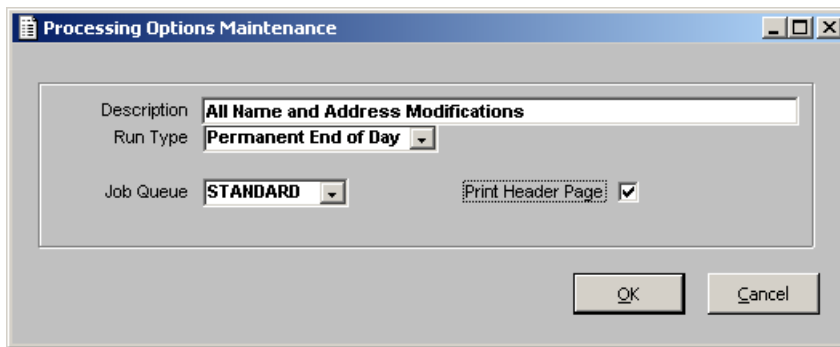


This dialog box is identical to the one above, but with the following differences:

- Previous Report:** The text box now contains "07-Feb-2003 10:56:43".
- From Previous Report:** The checkbox remains checked.
- Buttons:** The "Process" button is highlighted, indicating it is the next step.

Select the "Process" button and schedule the report for the nightly End of Day process. (The "End of Calendar Day" and "Schedule" button can be used to define an alternate frequency if desired.)

i.e.

A screenshot of a Windows-style dialog box titled "Processing Options Maintenance". The dialog has a blue title bar with standard window controls. Inside, there are three labeled fields: "Description" with a text box containing "All Name and Address Modifications", "Run Type" with a dropdown menu showing "Permanent End of Day", and "Job Queue" with a dropdown menu showing "STANDARD". To the right of the "Job Queue" field is a checkbox labeled "Print Header Page" which is checked. At the bottom right of the dialog are two buttons: "OK" and "Cancel".

### Report Type

The "Report Type" Processing Option indicates what reports to produce.

The "Summary" report is a compressed list of the Names that have been modified or have had subordinate entities modified.

For Example:

If a new Role Linkage is added to a Name then the Name will be reported regardless of whether the name itself was modified.

The "Detail" report is a comprehensive report of the Name and Address database updates and the names that were affected.

### Ad Hoc Reporting

A number of "Search Profile" options have been provided to enable detailed investigation into the database updates that have been performed on the Name and Address entities.

The "Name Key" field allows the entry of a specific Name Key that is displayed on the Personal and Company Name maintenance forms.

The report produced will only contain database updates that affect this Name.

The "Date Range" entry fields are enabled if the "From Previous Report" indicator is checked off.

The report produced will only contain database updates that occurred between the two dates.

The "Action" dropdown list box allows for the selection of what type of database modifications to report. This selection allows you to limit the report to only show records that were created, or records that were deleted, or records that were updated.

The "Job Type" dropdown list box allows for the selection of what type of job performed the database modifications.

This selection allows you to limit the report to only show database modifications that were performed by Interactive or Batch jobs. Selecting "Interactive" will eliminate the thousands of updates that would have been reported after a Name and/or Address Rebuild function is performed.

## Name and Address Audit Control Form

This form controls the production of the Audit Set Report. It is envisaged that the Audit Set Report will be executed periodically by councils through the standard End of Day scheduling.

*Name and Address Audit Control Form*

### Audit Set

Select the Audit Set Pop Up Button to select a previously defined Audit Set.

### Previous Report

The 'Previous Report' field will automatically default to the current date without a time if no report has been previously produced. Otherwise, it will automatically default to the date and time at which the report was previously produced.

### Name Key

The "Name Key" field allows the entry of a specific Name Key that is displayed on the Personal and Company Name Maintenance forms.

The report produced will only contain database updates that affect this Name.

### From Previous Report

Check the 'From Previous Report' checkbox if a report is required for all database changes since the last report.

### Date Range

The "Date Range" entry fields are enabled if the "From Previous Report" indicator is checked off. The report produced will only contain database updates that occurred between the two dates.

### Action

The "Action" dropdown list box allows for the selection of what type of database modifications to report. This selection allows you to limit the report to only show records that were created, or records that were deleted, or records that were updated.

The options available from the dropdown areas follows:

- (All)
- Create
- Update
- Delete

### Job Type

The "Job Type" dropdown list box allows for the selection of what type of job performed the database modifications.

This selection allows you to limit the report to only show database modifications that were performed by Interactive or Batch jobs. Selecting "Interactive" will eliminate the thousands of updates that would have been reported after a Name and/or Address Rebuild function is performed.

The options available from the dropdown are as follows:

- Interactive
- Batch
- (All)

**Processing Options – Report Type**

The 'Report Type' processing option indicates what reports to produce.

The 'Summary' report is a compressed list of Names that have been modified or have had subordinate entities modified, for example,

If a new Role Linkage is added to a Name then the Name will be reported regardless of whether the name itself was modified.

The "Detail" report is a comprehensive report of the Name and Address database updates and the names that were affected.

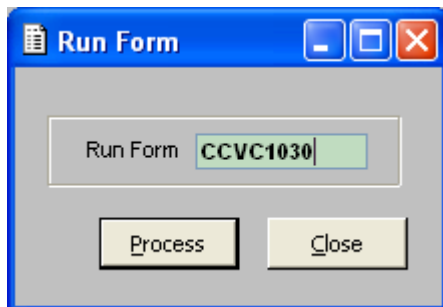
# Name and Address Template Conversion

## Preparation Required

- New templates to convert into must be created prior to running this process and the processing rules of those templates defined.
- New Zealand Rural Delivery addresses require additional preparation; please refer to notes on these addresses at the end of this document.
- A Formatted Address rebuild for all addresses must be performed prior to running this process – this is critical for NZ Sites who have a different sequence to cater for Rural Delivery addresses. Refer to the **'Important Information Before Starting Conversion Process'** notes in that section.
- It is recommended that after the Formatted Address rebuild is done a backup of the Pathway database is made prior to running the New Template Conversion process to allow the database to be restored if results are not as anticipated.
- This process is able to be multi-threaded for improved performance. Refer to the end of this document for instructions on assigning threading queues.

## How to run the process

1. Log on to a Pathway session of the correct environment as the SCASYS user.
2. From the menu Tools menu, activate the Run command (or press [Ctrl]+[Shift]+R).



3. Enter CCVC1030 as the Run Form and activate the Process button and you will be presented with the New Template Conversion Control form

**Special Instructions**  
Please ensure a Formatted Address Rebuild has been performed for all addresses before performing this process.  
Changes made with this process cannot be reversed.

**Search Profile**  
Template to Convert

Compare Value	New Template	New Template Mapping
CMA		---
CMB		---
CPA		---
DX		---
GPO Box		---
Locked Bag		---
MS		---
P O Box		---
PO Box		---
R D		---
RSD		---
RMB		---
RMS		---
Private Bag		---

Options Process Cancel

The intent of this form is to allow the 'Address Types' that currently exist in your environment to be mapped to a new Address Template that has been defined for the specific 'Address Type'.

The Compare Value column, lists examples of 'Address Types' as defined by Australia Post and New Zealand Post. This Compare Value is used purely to locate an Address, where an Address has a line anywhere in that address that contains this 'Compare Value'.

4. Specify the Template to Convert.

All addresses that use that template will be checked to see if they require conversion.

The Compare Values listed are the actual values used to determine if existing addresses require conversion to new templates. If no template is specified against a Compare value, addresses containing this value will remain unchanged.

For example PO Box could be in a Prefix Field or in the House Id. If it is in the House ID, it could follow a C/- line. The conversion process will locate an Address where PO Box (as an example) is in any field and in any position in that field.

Once the conversion process locates an address that has a line content matching the 'Compare Value' it will then use the New Template and the New Template Mapping to determine how to move the address to the new template and which template address lines to populate.

A single conversion run may convert to one or many new templates.

**New Template Conversion Control**

**Special Instructions**  
Please ensure a Formatted Address Rebuild has been performed for all addresses before performing this process.  
Changes made with this process cannot be reversed.

**Search Profile**  
Template to Convert: **1** >> Australian Residential Address

Compare Value	New Template	New Template Mapping
CMA	>>	...
CMB	>>	...
CPA	>>	...
DX	>>	...
GPO Box	5 >>	Australian GPO Box Address
Locked Bag	>>	...
MS	>>	...
P O Box	>>	...
PO Box	4 >>	Australian PO Box Address
R D	>>	...
RSD	>>	...
RMB	>>	...
RMS	>>	...
Private Bag	>>	...

Options Process Cancel

5. When a New Template is specified against a Compare value, the New Template Mapping detail button becomes available. For each New Template, the mapping details must be provided.

This allows you to define the destination Prefix/House Id fields for the different address lines for the Address record being converted.



6. Click on each New Template Mapping detail button for which a New Template has been specified:

Address Line Content Compare Value	Destination Field
CMA*	(none)
CMB*	(none)
CPA*	(none)
DX*	(none)
GPO Box*	(none)
Locked Bag*	(none)
MS*	(none)
P O Box*	(none)
PO Box*	(none)
R D*	(none)
RSD*	(none)
RMB*	(none)
RMS*	(none)
Private Bag*	(none)
CL*	(none)
C/O*	(none)
Att*	(none)

7. A Destination Field must be specified against at least one of the listed Address Line Content Compare Values, however in reality it must include destinations for all the possible combinations of address line data that may be associated to the Address Type (Compare Value) selected on the previous form.

The list of available fields is restricted to the prefix or identifier fields defined in the New Template that are sequenced above the first component line.

Address Line Content Compare Value	Destination Field
CMA*	(none)
CMB*	(none)
CPA*	(none)
DX*	(none)
GPO Box*	GPO Box
Locked Bag*	(none)
MS*	(none)
P O Box*	(none)
PO Box*	(none)
R D*	(none)
RSD*	(none)
RMB*	(none)
RMS*	(none)
Private Bag*	(none)
C/-*	(none)
C/O*	(none)
Att*	(none)

The presented list of Address Line Content Compare Values contains all of the Compare To values from the Control form as well as some additional ones to allow for additional address lines such as C/- Infor or Att: W Smith to be mapped to the correct prefix fields.

If these mapping values are not specified the process will attempt to automatically place additional address lines in the correct prefix fields.

To understand this process some examples have been provided using PO Box as the Compare Value.

### Example 1

Existing Address:

Prefix 1	Attention: Mr John Citizen
Prefix 2	PO Box 123
Suburb	Wayville
State	SA
Postcode	5034

New Template

Prefix 1	C/- or Attention To	(optional)
Prefix 2	PO Box	(mandatory)
Street		(optional)
Suburb		(mandatory)
State		(mandatory)
Postcode		(mandatory)

Destination Field Mapping

PO Box	Prefix 2
Att*	Prefix 1
C/-*	Prefix 1

Conversion result into new Template

Prefix 1	Attention: Mr John Citizen
Prefix 2	PO Box 123
Suburb	Wayville
State	SA
Postcode	5034

**Example 2**

Existing Address:

Prefix 3	PO Box 123
Suburb	Wayville
State	SA
Postcode	5034

New Template

Prefix 1	C/- or Attention To	(optional)
Prefix 2	PO Box	(mandatory)
Street		(optional)
Suburb		(mandatory)
State		(mandatory)
Postcode		(mandatory)

Destination Field Mapping

PO Box	Prefix 2
Att*	Prefix 1
C/-*	Prefix 1

Conversion result into new Template

Prefix 1	
Prefix 2	PO Box 123
Suburb	Wayville
State	SA
Postcode	5034

**Example 3**

Existing Address:

House ID	C/- Mr Smith
	PO Box 123
Suburb	Wayville
State	SA
Postcode	5034

New Template

Prefix 1	C/- or Attention To	(optional)
Prefix 2	PO Box	(mandatory)
Street		(optional)
Suburb		(mandatory)
State		(mandatory)
Postcode		(mandatory)

Destination Field Mapping

PO Box	Prefix 2
Att*	Prefix 1
C/-*	Prefix 1

Conversion result into new Template

Prefix 1	C/- Mr Smith
Prefix 2	PO Box 123
Suburb	Wayville
State	SA

Postcode 5034

As you can see from this, it did not matter where the PO Box 123 was located, the conversion is able to map to the new Address lines in the new template.

Where there are address lines that cannot be defined by the 'Address Line Content Compare Value' list, (i.e.: Property Names etc) the conversion process will attempt to align them into Prefix Fields that are in sync with how the old address was constructed.

#### **Example 4**

Existing Address:

Prefix 1	C/- Mr Smith
Prefix 3	Jacaranda Villa
House ID	RMB 45
Street	Main Road
Suburb	Coromandel Valley
State	SA
Postcode	5051

New Template

Prefix 1	C/- or Attention To	(optional)
Prefix 2	Property Name	(optional)
Prefix 3	RMB	(mandatory)
Street		(mandatory)
Suburb		(mandatory)
State		(mandatory)
Postcode		(mandatory)

Destination Field Mapping

RMB*	Prefix 3
Att*	Prefix 1
C/-*	Prefix 1

Conversion result into new Template

Prefix 1	C/- Mr Smith
Prefix 2	Jacaranda Villa
Prefix 3	RMB 45
Street	Main Road
Suburb	Coromandel Valley
State	SA
Postcode	5051

It has placed the Property Name into a prefix field that was below Prefix 1, as the original address had the Property Name positioned below the Attention line.

#### **Example 5**

Existing Address:

Prefix 3	Jacaranda Villa
House ID	RMB 45
Street	Main Road
Suburb	Coromandel Valley
State	SA
Postcode	5051

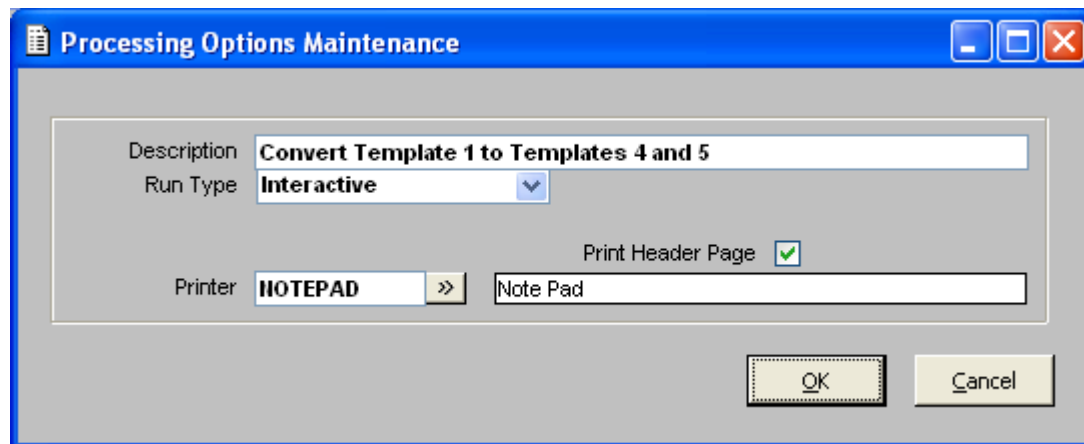
New Template

Prefix 1	C/- or Attention To	(optional)
Prefix 2	Property Name	(optional)
Prefix 3	RMB	(mandatory)
Street		(mandatory)
Suburb		(mandatory)

State	(mandatory)
Postcode	(mandatory)
Destination Field Mapping	
RMB*	Prefix 3
Att*	Prefix 1
C/-*	Prefix 1
Conversion result into new Template	
Prefix 2	Jacaranda Villa
Prefix 3	RMB 45
Street	Main Road
Suburb	Coromandel Valley
State	SA
Postcode	5051

It has placed the Property Name into a prefix field that was above Prefix 3, as the original address had the Property Name positioned above the RMB line.

8. Once all mapping details have been specified, activate the Process button.



9. Note that the process produces an Exception Report. The Exception Report will list any addresses that matched one of the Compare values but were unable to be converted to the specified New Template. The Address Key and original formatted address are listed on the report along with the reason the address could not be converted.
10. The process will not convert any addresses to a new template unless the result of doing so does not change the formatted address.

Addresses that appear on the Exception Report may be located in Pathway Address Maintenance using the Address Key and must be converted to the new template manually.

**Address Search Profile**

**Search Profile Selection**

Template: 1 >> Australian Residential Address

**Search Profile**

Address Key: 12345

Forwarding:

Property Name:

Level/Unit Number:

House/Street Number:

Street: >>

Suburb: >>

State: >>

Post Code: >>

New Search Cancel

*Address Search Profile Form*

## Additional Compare Values

Every effort has been made to consider all possible addresses that may require conversion to new templates and a set of compare values has been provided to enable this to happen. If additional compare values are necessary to enable more addresses to be automatically converted that have not been provided, the Infor Helpdesk will be able to provide assistance with adding additional values.

## Additional Notes on New Zealand Rural Delivery Addresses

New Zealand Rural Delivery addresses would normally be set up in Pathway to hold the Rural Delivery number as a prefix field and have it sequenced below the Street component. An example of what the new template may look like is:

**Address Template Line Maintenance**

Template

Before Separator	Prefix Description	Prefix Default Value	Case Conversion	Next Separator	Mandatory
New Line	C/O		No Conversion	New Line	<input type="checkbox"/>
New Line	Attention		No Conversion	New Line	<input type="checkbox"/>
New Line	R D	R D<>	Numeric Only	New Line	<input checked="" type="checkbox"/>

Before Separator	Identifier Description	Identifier Default Value	Case Conversion	Next Separator	Mandatory
New Line	Identifier		No Conversion	New Line	<input type="checkbox"/>

Before Separator	Sequence	Component Type	Case Conversion	Next Separator	Mandatory	Relations
Space	1	1 Street	Capitalize	New Line	<input checked="" type="checkbox"/>	...
New Line	2	3 Town/City	Capitalize	New Line	<input checked="" type="checkbox"/>	...
Triple Space	3	5 Post Code	Numeric Only	New Line	<input type="checkbox"/>	...

Sequence Insert OK Cancel

and the sequence defined to this example template is:

**Formatted Address Sequence Maintenance**

Template

**Options**

Include Contact ☐

Before Separator	Component	Next Separator
New Line	Address Prefix 1 : C/O	New Line
New Line	Address Prefix 2 : Attention	New Line
New Line	Identifier	New Line
Space	Street	New Line
New Line	Address Prefix 3 : R D	New Line
New Line	Town/City	New Line
Triple Space	Post Code	New Line

Move

OK Cancel

An example address that might use this template is:

**Address Maintenance**

**Address Template**

Template  >>

**Address**

Address Key

C/O

Attention

R D

Identifier

Street  >>

Town/City  >>

Post Code  >>

**Create Address Component**

☐ Street ☐ Town/City ☐ Post Code

with the resulting formatted address being:

C/O Mrs Brown  
 Guy Rd  
 R D 3  
 Kaiapoi 8252

#### **\*\* Important Information Before Starting Conversion**

##### **Do I need to make changes to existing Template?**

If your existing Template, has a unique field for Rural Addresses and this Prefix field is positioned below the Street line, (as can be seen via the Sequence Button on the Address Template), then please refer to the section on Old Template.

If it is not structured in this manner, please refer to the section on New Template.

If a site already has a separate Template for Rural Addresses, no action is required and no conversion.

#### **Old Template**

**Important:** Prior to running the Formatted Address Rebuild, as advised at the beginning of this document, you must modify your existing Template, to temporarily re-position the R D prefix field to be above the first component.

Once this has been done, the Formatted Address Rebuild will need to be run, to enable the before and after compare of Formatted Addresses to be exact.



### New Template Only

The New Zealand Rural Delivery address template, or others like it that have prefix fields sequenced BELOW the first component, must have the sequence temporarily changed for the R D prefix field to be above the first component.

### Conversion Process

The New Template Conversion modifies prefix field and identifier field values to enable address lines to be mapped to the new template correctly. It only considers prefix fields that are sequenced ABOVE the first component.

Once this is done, the New Template Conversion process will make the R D prefix field available in the mapping details. The process then needs to be run as per previous instructions.

### After Conversion

Once the conversion process is complete, both the old and the new template(s) need to be modified to place the R D field below the Street component as it needs to be.

A Formatted Address rebuild must then be performed over addresses that use this template. To ensure that all addresses that use this template are rebuilt without having to rebuild all addresses it is recommended that a Query Result is used to identify the addresses that need rebuilding.

## Template Conversion Exception Messages

Upon attempting to convert a Mailing Address, the details of the two templates will be checked to ensure that the details of the address can be successfully converted into a corresponding field. Additionally, the final check performed will ensure that the resulting Formatted Address remains the same.

Below are the Exception Messages that may appear on the resulting Exception Report from the Template Conversion process. Where an address appears on this report, the address has not been converted into the new template and will remain in the existing template. These addresses will require some form of manual intervention in order to have them successfully convert.

**(1) *No prefix or identifier fields defined to enable conversion to template X.***

The Address selected for conversion has information in the Prefix or identifier fields. The template that the address is being converted to does not have this field defined.

**(2) *Unmatched address lines when converting to template X***

The resulting formatted address has unmatched individual address lines. The address contains address lines that were not able to be matched to an equivalent address line in template X

**(3) *Formatted address mismatch when converting to template X.***

The resulting formatted address for the new template does not match the original formatted address. This may be due to line returns. The Address example below would result in this error:

Existing Address	PO Box 1234 Gouger Street Adelaide SA 5000
New Address	PO Box 1234 Gouger Street Adelaide SA 5000

Differences in the Template component Spacing eg, double to triple, will not cause this error.

**(4) *Additional unmatched address lines when converting to template X***

All address lines were unable to be matched to the new template.

**(5) *Unmatched address line(s) above matched address line when converting to template X***

There are address lines in the original address that could not be matched. This message is advising that the un-matched address lines are 'above' the matched address line in the template sequence.

**(6) *Unmatched address line conflict when converting to template X***

The resulting formatted address has unmatched individual address lines. The existing address contains multiple address lines matched to the same address line of the new template.

**(7) *Unmatched address lines below matched address line when converting to template X***

There are address lines in the original address that could not be matched. This message is advising that the un-matched address lines are 'below' the matched address line in the template sequence.

**(8) *No value mapped to mandatory 'Prefix Field description' when converting to template X***

The Existing address does not have any information in the listed Prefix field however this field is mandatory in the new address template.

**(9) *Non-numeric value mapped to Numeric Only 'Prefix Field description' when converting to template X***

The existing address has non-numeric data in the listed Prefix field however the field that this is mapped to in the new template has 'Numeric Only' Case Conversion applied to it.

**(10) *No template line for 'Component Description' when converting to template X***

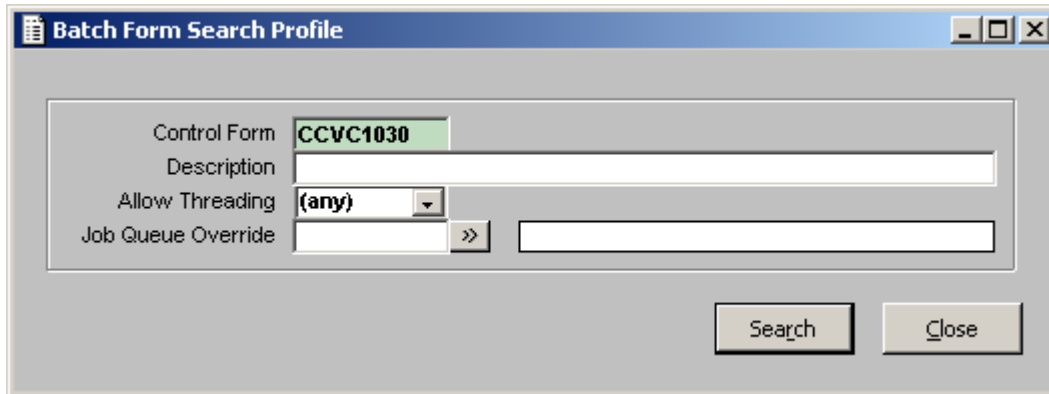
The existing address has information in the listed Component field however this component does not form part of the new template.

**(11) *No value mapped to mandatory 'Component Description' component when converting to template X***

The Existing address does not have any information in the listed Component field however this field is mandatory in the new address template.

## Multi-Threading Process

1. Access Menu Option Batch Processing >> Batch Form Maintenance
2. Enter Form CCVC1030 and click on Search

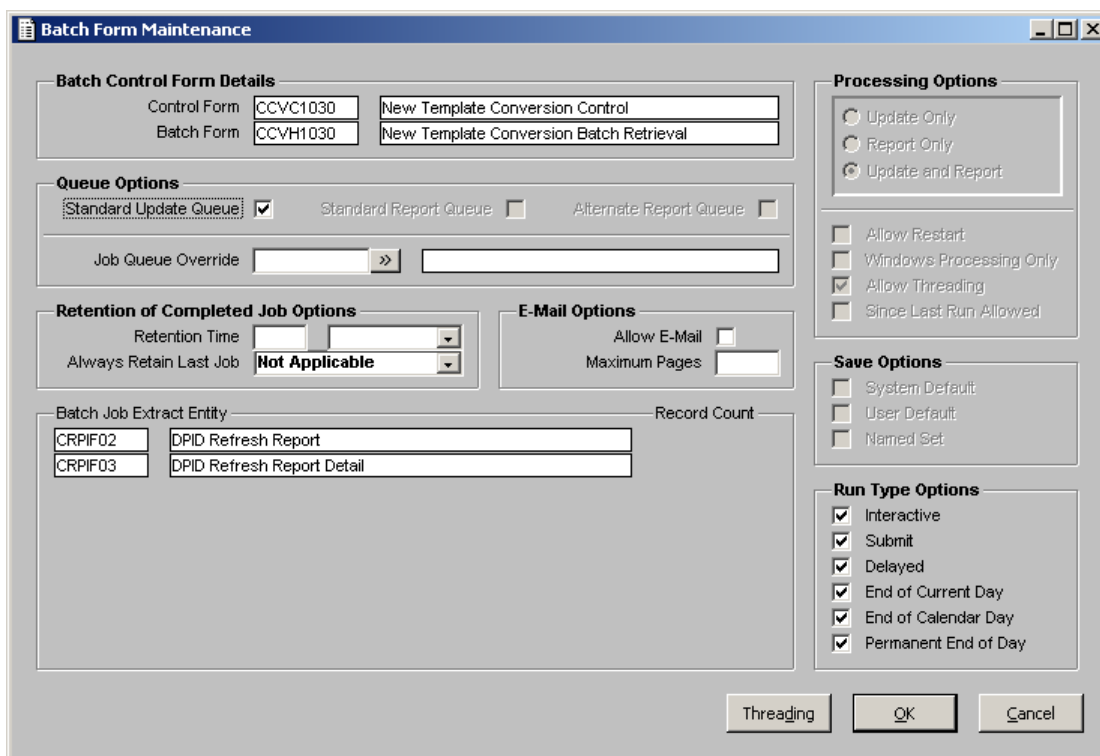


The **Batch Form Search Profile** dialog box contains the following fields and controls:

- Control Form:** Text box containing **CCVC1030**.
- Description:** Empty text box.
- Allow Threading:** Dropdown menu showing **(any)**.
- Job Queue Override:** Text box with a right-pointing arrow button next to it.
- Buttons:** **Search** and **Close** buttons at the bottom right.

*Batch Form Search Profile*

3. Click on the Threading Button at the bottom of the Batch Form Maintenance Form.



The **Batch Form Maintenance** dialog box is divided into several sections:

- Batch Control Form Details:**
  - Control Form: **CCVC1030**
  - Batch Form: **CCVH1030**
  - New Template Conversion Control: **New Template Conversion Control**
  - New Template Conversion Batch Retrieval: **New Template Conversion Batch Retrieval**
- Queue Options:**
  - ☒ Standard Update Queue
  - ☐ Standard Report Queue
  - ☐ Alternate Report Queue
  - Job Queue Override: Text box with a right-pointing arrow button.
- Retention of Completed Job Options:**
  - Retention Time: **Not Applicable** (dropdown)
  - Always Retain Last Job: **Not Applicable** (dropdown)
- E-Mail Options:**
  - Allow E-Mail: ☐
  - Maximum Pages: Text box
- Batch Job Extract Entity:**

Batch Job Extract Entity	Record Count
CRPIF02	DPID Refresh Report
CRPIF03	DPID Refresh Report Detail
- Processing Options:**
  - ☐ Update Only
  - ☐ Report Only
  - ☒ Update and Report
  - ☐ Allow Restart
  - ☐ Windows Processing Only
  - ☒ Allow Threading
  - ☐ Since Last Run Allowed
- Save Options:**
  - ☐ System Default
  - ☐ User Default
  - ☐ Named Set
- Run Type Options:**
  - ☒ Interactive
  - ☒ Submit
  - ☒ Delayed
  - ☒ End of Current Day
  - ☒ End of Calendar Day
  - ☒ Permanent End of Day
- Buttons:** **Threading**, **OK**, and **Cancel** buttons at the bottom.

*Batch Form Maintenance Form*

4. Assign the Threading Queues that are to be allocated to the Template Conversion Program.

Threading Maintenance

Control Form: CCVC1030    New Template Conversion Control  
Batch Form: CCVH1030    New Template Conversion Batch Retrieval

**Available Threading Queues**

LRATHREAD4	LRA Job Queue 4
LVV1	Victorian Valuations
LVV2	Victorian Valuations
PDF_Q	Convert document to PDF & Email - ADEAU
POLLING	Enterprise One Polling Queue
TEST Q 1	Test Job Queue 1
TEST Q 2	Test Job Queue 2
TEST Q 3	Test Job Queue 3
WORDER	Work Orders

**Selected Threading Queues**

THREAD1	Threading Job Queue 1
THREAD2	Threading Job Queue 2
THREAD3	Threading Job Queue 3

OK    Cancel

*Threading Maintenance Form*

5. The Template Conversion process has now been setup for Multi-threading. Ensure that these threads are running prior to submitting the conversion to the Batch Processor.

## **One View – Customer Payment Enquiry**

The following topic is covered in this section:

[Customer Payment Enquiry](#)

## Customer Payment Enquiry

### One View – Customer Payment Name Selection

Name	Address	Active
<b>AN NOMINEES P/L</b>	<b>C/- Blackfords Management Services, 278 Flinders St, NORTH AL</b>	<input checked="" type="checkbox"/>
ANA BULKUS & ASSOCIATES	249-251 Flinders St, ADELAIDE SA 5000	<input checked="" type="checkbox"/>
<b>ANABEE P/L</b>	<b>PO BOX 3316, Rundle Mall, ADELAIDE SA 5000</b>	<input checked="" type="checkbox"/>
ANABEE P/L & N BULKUS	C/- A Bulkus, GPO BOX 2019, ADELAIDE SA 5001	<input checked="" type="checkbox"/>
Anagnos, Olga	231-232 North Tce, ADELAIDE 5000	<input checked="" type="checkbox"/>
<b>ANANCO P/L</b>	<b>575 Port Rd, WEST CROYDON SA 5008</b>	<input checked="" type="checkbox"/>
Ancell, Brian Edward J	Harvey Rd, ONE TREE HILL SA 5114	<input checked="" type="checkbox"/>
Andary, Alfred	C/- 202 Halifax St, ADELAIDE SA 5000	<input checked="" type="checkbox"/>
Andary, Linda	2/15 Power St, ADELAIDE SA 5000	<input checked="" type="checkbox"/>

**Name Details**

Communication Details Information Details Application Information Details Current - Owner Vote: 2003; test performance; Sole Current - Property Owner: 170 Brougham Place, NORTH	Application Mailing Address Details Owner Vote: C/- Blackfords Management Services, 27
--	---

*One View –Customer Payment Name Selection Form*

#### \*\* Authorised Function \*\*

Upon Entry to the One View Customer Payment Enquiry Option, the Name selection form will be displayed. Those names that appear in bold text have Pathway Debts Modules associated to them. This does not mean that these names have an outstanding debt. Those names that do not appear in bold do not have any name roles associated to the Pathway debt modules.

Highlight the require name and click on Display to view the One View - Customer Payment Enquiry Form.

### One View – Customer Payment Enquiry

Owing	Reference	Location Description / Detail	Joint
22.00	AN 2628	1 Mullen Close, Woodcroft SA 5162 / Malamute / D	<input type="checkbox"/>
57.00	AP DA/409/2000	4 Mullen Close, Woodcroft SA 5162 / Development Applications	<input checked="" type="checkbox"/>
55.00	IF 30000261	By Laws Infringements / Loud Music	<input type="checkbox"/>
410.00	LC 23/2000/MEAT	"Renate House", 4 Section Street, Daw Park SA 5098 / TRIM Testing	<input checked="" type="checkbox"/>
2560.00	RA 25269 (2)	"Building with 4 Floors", 1/600 Main Highway, Auckland NEW ZEALAND	<input type="checkbox"/>
50.00	VB 24589 (4)	"Base Property", 7 Mullen Close, Woodcroft SA 5162	<input checked="" type="checkbox"/>
29.00	TV 259 (2)	1 Mullen Close, Woodcroft SA 5162	<input checked="" type="checkbox"/>

One view – Customer Payment Enquiry Form

**\*\* Authorised Function \*\***

The Customer Payment Enquiry Form will display records for the selected name where an amount is currently Owing. The Modules that may appear here for a given name include

- Animals
- Applications
- Bookings Management (Only for Cash Account Bookings)
- Infringements (where a name is linked to the ticket)
- Licensing
- Rates
- Water Billing (when in use by council and separate assessments are used for Water and Rates)
- Debtors
- Trade Waste

For each record the Amount Owing, Reference details and Locations will be displayed. Where there are multiple owners the Joint checkbox will be checked ON. This field is for display only and cannot be maintained through Customer Payment Enquiry.

The Detail Button at the end of each record will allow access to the module record details in ENQUIRY mode only. Additionally a name enquiry has been made available from this form.

**Instalments**

The Instalment button will only be displayed where applicable. Where an Assessment is displayed that currently has an instalment plan, this button will be available for use. Click on the Instalment button to change the Owing amount to the Instalment amount. When you are viewing an instalment amount, the Amount Owing will be displayed as bold text.

**All Accounts**

The All Accounts button may be taken to display ALL current links for the selected name to the modules listed above regardless of the current 'balance' of that record.



## POSTman Integration

The following topics are covered in this section:

[POSTman Interface](#)

[POSTman Integration Parameters](#)

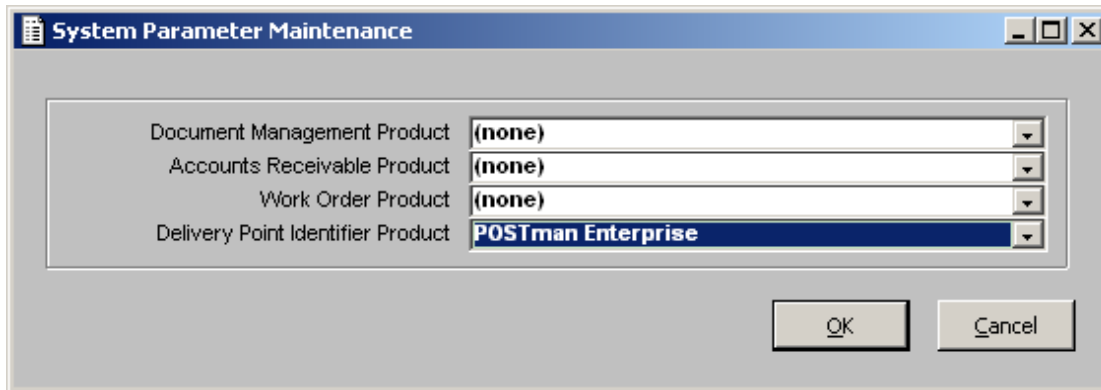
[POSTman DPID Refresh](#)

[Modules Included in POSTman Interface](#)

## POSTman Interface

### System Parameter Maintenance

The System Administration >> Integration >> System Parameter Maintenance form has been enhanced to provide for the selection of a DPID Product. This allows for the selection of POSTman.



Document Management Product	(none)
Accounts Receivable Product	(none)
Work Order Product	(none)
Delivery Point Identifier Product	POSTman Enterprise

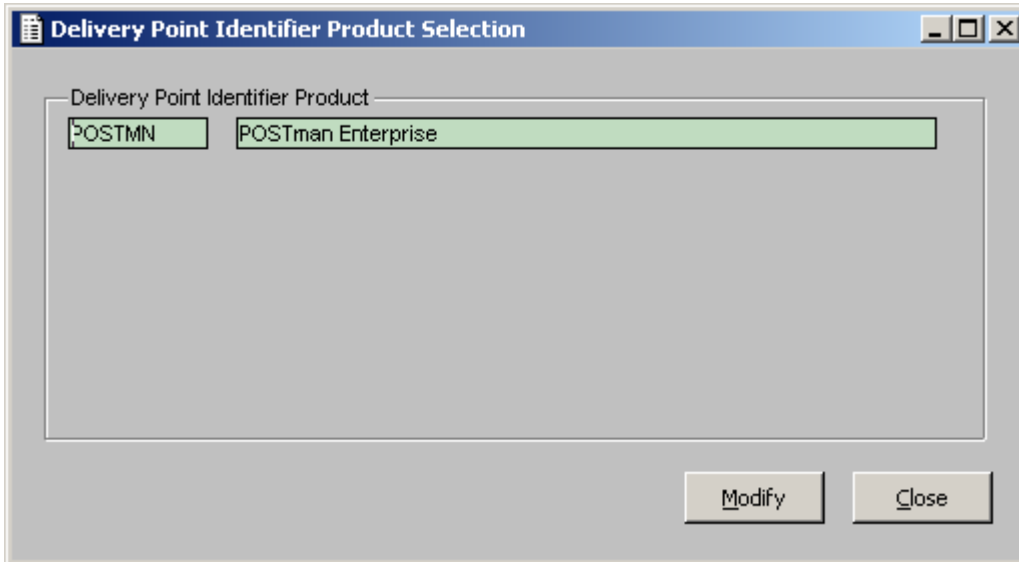
*System Parameter Maintenance Form*

Once the DPID Product has been set, DPID Validation and associated processing will occur within Pathway.

The DPID product will be set to '(none)' by default.

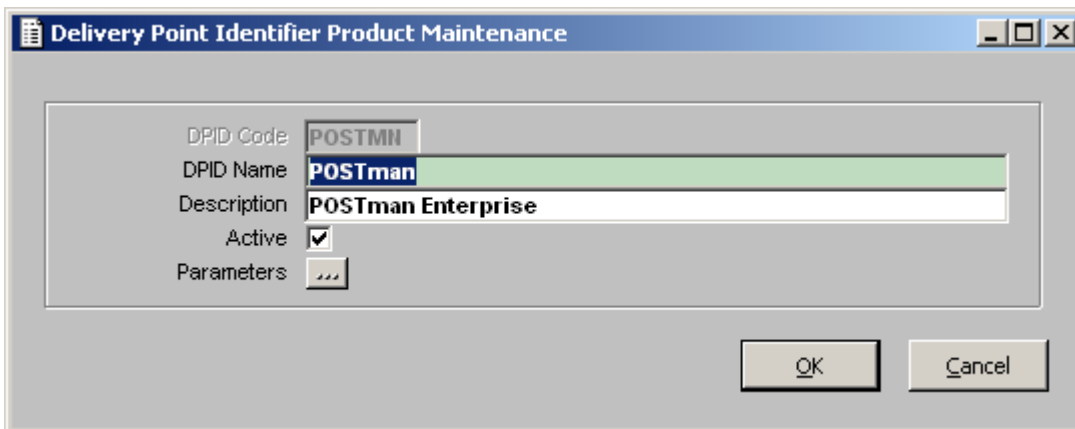
# POSTman Integration Parameters

## DPID Product Selection

A screenshot of a software window titled "Delivery Point Identifier Product Selection". The window has a blue header bar with a document icon on the left and standard window controls (minimize, maximize, close) on the right. The main area is a light gray rectangle. At the top of this area, the text "Delivery Point Identifier Product" is displayed. Below it, there are two green rectangular buttons: the first is labeled "POSTMN" and the second is labeled "POSTman Enterprise". At the bottom right of the window, there are two buttons: "Modify" and "Close".

*Delivery Point Identifier Product Selection Form*

## DPID Product Maintenance

A screenshot of a software window titled "Delivery Point Identifier Product Maintenance". The window has a blue header bar with a document icon on the left and standard window controls (minimize, maximize, close) on the right. The main area is a light gray rectangle. Inside, there is a form with several fields: "DPID Code" with a text box containing "POSTMN"; "DPID Name" with a text box containing "POSTman"; "Description" with a text box containing "POSTman Enterprise"; "Active" with a checked checkbox; and "Parameters" with a button containing three dots "...". At the bottom right of the window, there are two buttons: "OK" and "Cancel".

*Delivery Point Identifier Product Maintenance Form*

### DPID Name

This is the name of the Product and defaulted by Infor.

### Description

This is the description of the Product and defaulted by Infor

### Active

The Active flag will default to ON, and can be left ON, as the System Parameter controls whether POSTman is in use or not.

### Parameters

The Parameter button allows various rules to be defined as to what validation is to apply at the various templates defined.

## POSTman Parameter Maintenance

**POSTman Parameter Maintenance**

**Options**

Maximum Interactive Matches: 20  
Maximum Refresh Matches: 20

Abbreviate Level Type: ☐  
Abbreviate Unit Type: ☐

**Address Template**

50 218 Residential/Street Address ☒ Validate

☐ Validate Address Prefix 1 : C/- Forwarding  
☐ Validate Address Prefix 2 : Property Name  
☒ Validate Address Prefix 3 : Unit/Level  
☒ Validate Identifier : House Number

52 218 PO Box ☒ Validate

☒ Validate Address Prefix 1 : PO Box  
☐ Validate Address Prefix 2 : C/-

54 218 GPO Box ☒ Validate

☒ Validate Address Prefix 1 : GPO BOX

OK Cancel

*Postman Parameter Maintenance Form*

### Maximum Interactive Matches

It is recommended that this be set to a nominal amount, to avoid POSTman returning hundreds of addresses, when a specific match is not found.  
Infor recommend 20.

### Maximum Refresh Matches

It is recommended that this be set to a nominal amount, to avoid Postman returning hundreds of addresses, when a specific match is not found.  
Infor recommend 20.

### Abbreviate Level Type

The Checkbox allows Pathway to determine how to create an address in Pathway, when Levels are returned by POSTman. Australia Post supports both an abbreviated Level or the full term and therefore this Checkbox controls the action in Pathway.

Checking ON, will pass an abbreviated term for a Level, i.e.: L or M etc.

Checking OFF, will pass the full term for a Level, i.e.: Level, Mezzanine etc

### Abbreviate Level Unit

The Checkbox allows Pathway to determine how to create an address in Pathway, when Units are returned by POSTman. Australia Post supports both an abbreviated Unit or the full term and therefore this Checkbox controls the action in Pathway.

Checking ON, will pass an abbreviated term for a Unit, i.e.: U or F etc.

Checking OFF, will pass the full term for a Unit i.e.: Unit or Flat etc

### Address Template Validation

This allows the various Address Templates that council have defined to be flagged for validation within POSTman.

It is recommended that a set of Address Templates be defined, (this recommendation is included in the Rel 2.18 Release Text for Address Templates). All of the recommended Templates should be validated with POSTman, with the exception of a Free Format Template or an Overseas Template that may have been defined.

The flag at the Address Template level, determines whether any validation will be performed over the Template itself.

The flag at the Prefix/Identifier field level, controls whether validation is required at each individual level.

**Important: Property Name, C/- fields, MUST have the Validation flag on the left hand side set OFF. i.e.: Unit/Levels, PO Box, GPO Box etc should be set ON, but any other free format, non Australia Post, type prefix fields should be set to OFF.**

### Matching Parameters

Use the Matching Parameters detail button at the end each record to access the POSTman Match Parameter Maintenance Form. This form provides the set up to ensure that data being returned from POSTman is allocated to the correct and relevant Prefix Fields.

### POSTman Match Parameter Maintenance

The recommendation, where a site implements Address Templates as per the Infor recommendations, or where similar Prefix fields are used, is as follows:

#### Match Options

C/-: None Assigned

The screenshot shows a window titled "POSTman Match Parameter Maintenance". It contains a section for "Address Template" with a dropdown menu showing "50" and a text field containing "218 Residential/Street Address". Below this is a text field labeled "Validate Address Prefix 1 : C/- Forwarding". The main area is divided into two panes: "Available Match Options" on the left and "Selected Match Options" on the right. The "Available Match Options" pane contains a list of fields: "Property Name One", "Property Name Two", "Lot Number", "Level Type", "Level Number", "Unit Type", "Unit Number", "Street Number One", and "Street Number One Suffix". The "Selected Match Options" pane is currently empty. Between the two panes are two buttons with arrows and list icons, used for moving items between the panes. At the bottom right are "OK" and "Cancel" buttons.

Property Name: None Assigned

**POSTman Match Parameter Maintenance**

**Address Template**

50 218 Residential/Street Address

Validate Address Prefix 2 : Property Name

**Available Match Options**

- Property Name One
- Property Name Two
- Lot Number
- Level Type
- Level Number
- Unit Type
- Unit Number
- Street Number One
- Street Number One Suffix

**Selected Match Options**

OK Cancel

Unit/Level Prefix Field: as below.

**POSTman Match Parameter Maintenance**

**Address Template**

50 218 Residential/Street Address

Validate Address Prefix 3 : Unit/Level

**Available Match Options**

- Property Name One
- Property Name Two
- Lot Number
- Street Number One
- Street Number One Suffix
- Street Number Two
- Street Number Two Suffix
- PO Box Type
- PO Box Number Prefix

**Selected Match Options**

- Level Type
- Level Number
- Unit Type
- Unit Number

OK Cancel

Identifier Field: as below.

**POSTman Match Parameter Maintenance**

**Address Template**

50 218 Residential/Street Address

Validate Identifier : House Number

**Available Match Options**

- Property Name One
- Property Name Two
- Level Type
- Level Number
- Unit Type
- Unit Number
- PO Box Type
- PO Box Number Prefix
- PO Box Number

**Selected Match Options**

- Lot Number
- Street Number One
- Street Number One Suffix
- Street Number Two
- Street Number Two Suffix

OK Cancel

PO Box Prefix Field: as below.

**POSTman Match Parameter Maintenance**

**Address Template**

52 218 PO Box

Validate Address Prefix 1 : PO Box

**Available Match Options**

- Lot Number
- Level Type
- Level Number
- Unit Type
- Unit Number
- Street Number One
- Street Number One Suffix
- Street Number Two
- Street Number Two Suffix

**Selected Match Options**

- PO Box Type
- PO Box Number Prefix
- PO Box Number
- PO Box Number Suffix

OK Cancel

GPO Box Prefix Field: as below.



The screenshot shows the 'POSTman Match Parameter Maintenance' dialog box. The 'Address Template' section has a prefix field with '54' and a main field with '218 GPO Box'. Below it, the 'Validate Address Prefix 1 : GPO BOX' field is empty. The 'Available Match Options' list on the left includes: Lot Number, Level Type, Level Number, Unit Type, Unit Number, Street Number One, Street Number One Suffix, Street Number Two, and Street Number Two Suffix. The 'Selected Match Options' list on the right includes: PO Box Type, PO Box Number Prefix, PO Box Number, and PO Box Number Suffix. The 'Street Number Two Suffix' and 'PO Box Number Suffix' are highlighted in green. There are 'OK' and 'Cancel' buttons at the bottom right.

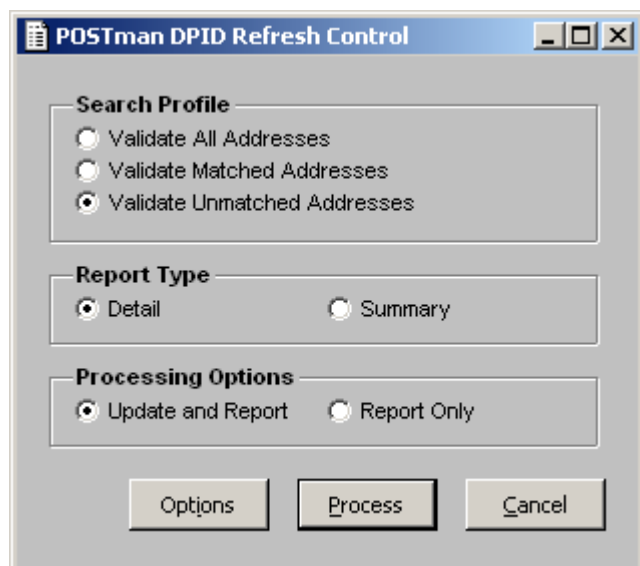
RSD (RMB etc) Prefix Field: as below.

The screenshot shows the 'POSTman Match Parameter Maintenance' dialog box. The 'Address Template' section has a prefix field with '56' and a main field with '218 RSD Address'. Below it, the 'Validate Address Prefix 2 : RSD' field is empty. The 'Available Match Options' list on the left includes: Property Name One, Property Name Two, Lot Number, Level Type, Level Number, Unit Type, Unit Number, Street Number One, and Street Number One Suffix. The 'Selected Match Options' list on the right includes: PO Box Number. The 'Property Name One' and 'PO Box Number' are highlighted in green. There are 'OK' and 'Cancel' buttons at the bottom right.

*POSTman Match Parameter Maintenance Form*

## POSTman DPID Refresh

System Administrator Menu - Production >> System Administration >> Integration >> DPID Parameters >> POSTman DPID Refresh



This menu option MUST be run, each time a new version of POSTman is received, with the updated PAF file.

### Search Profile

The Search Options provide the ability to perform validation only over 'unmatched' addresses, however it is recommended that it be run over 'all' addresses as Australia Post will from time to time change a DPID reference on an existing address.

This function can be run as many times as required, it will simply re-validate each time.

### Report Type

#### *Summary Report*

This produces the Total 'Number' of Matched Address and the Total 'Number' of Unmatched Addresses

#### *Detail Report*

This produces the Total 'Number' of Matched Address and the Total 'Number' of Unmatched Addresses as well as a listing of the details of all 'Unmatched' addresses.

It is our recommendation that this option is run with the Detail Report to enable Council to review the addresses that do not match to determine if they have been input correctly and are valid. Any changes made to an address via Address Maintenance will of course be validated in POSTman again.

### Processing Options

Update and Report – performs the update of the DPID values against the matched addresses

Report Only – performs the validation, does not update and simply produces the selected report.

### Address Processing with POSTman

For a Council to utilise POSTman, it will affect all Name and Address Users within Pathway.

As such, it is highly recommended that all Name and Address Users are taken through a training exercise prior to this being implemented in a live environment.

Once the Parameter is set to use POSTman, all modules are impacted.

The main change when using POSTman is the searching and address entry.

With the change to the Address Template structure in Rel 2.18, it is very important that Councils using POSTman, do NOT set the 'Display Template Selection for Addresses' within Name and Address Security to NO. This MUST be set to YES for all Users.

The following describes the processes and Infor recommendations:

### Name and Address Maintenance

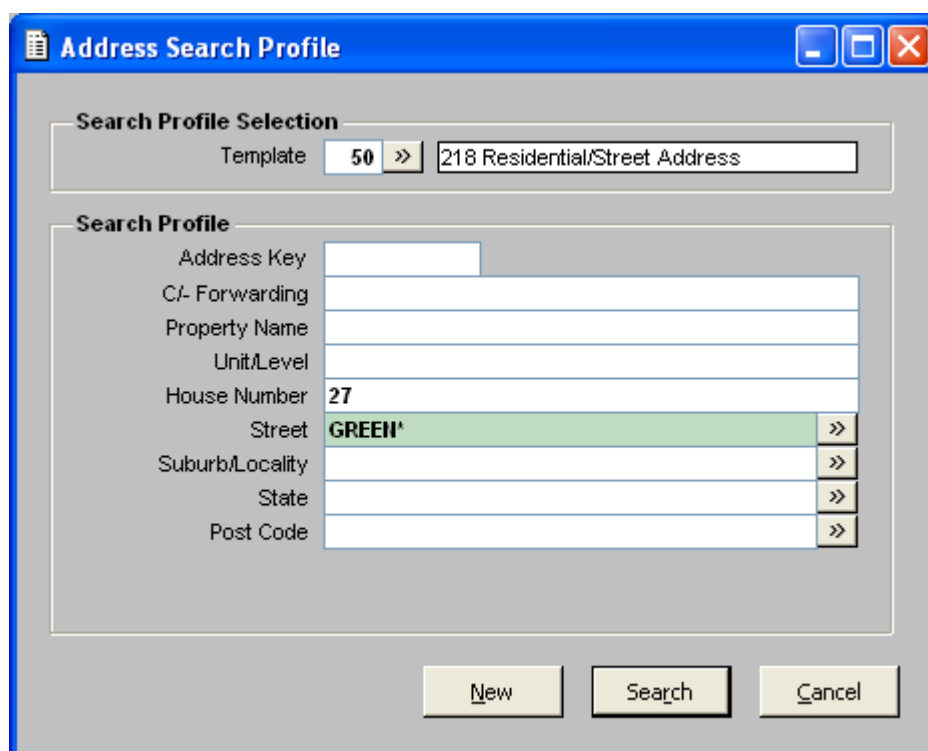
#### *New Names*

When a new name is added, it will require an Address, as per standard processing.

When the Address option is taken, the User will be prompted to select an Address Template.

The User should select the appropriate Address Template relevant to the address required.

Refer example:



*Address Search Profile*

Where C/-, Property Names, Unit/Levels or other Prefix field values are required, they should also be entered on the Search Form.

For example:

*Address Search Profile*

Once the relevant Address data is entered, the User will use the SEARCH button as usual for a Pathway address search without POSTman integration.

#### *Changing Addresses or Creating Addresses*

Where sites use Address Maintenance to 'change' an Address or 'change' an Address via Name and Address Maintenance direct or accessed from a Module, validation of the address will occur. If the address does not match, Pathway may display a list of near match addresses returned by POSTman that may be the address that is required. If it's simply select the address by using the Select button and Pathway address data will be updated. If there is no match (when the Cancel button is selected) Pathway will ask if you wish to accept the address even though it could not be matched in POSTman.

#### *Use of Property Names in Address*

POSTman will have some addresses with Property Names, but it is anticipated not as many as what may be used by the public.

As such, to ensure the ability to have Council record the Property Name required by the customer, and also validate the remaining address fields in POSTman, the following logic has been applied:

#### *User enters required Property Name*

Pathway parses all address lines except those flagged as not requiring validation (C/- and Property Names etc)

POSTman validates using those address lines and returns address details to Pathway

Pathway then re-adds the Property Name to the address that is being created in Pathway.

The intention is that where POSTman does have an address with a Property Name and this has not been entered by the User, that the Property Name will be returned by POSTman and utilised by Pathway. However, as of the version that is being issued in this Release, we are unable to finalise this process, therefore unless the User is aware of the Property Name and enters it as part of the Search/New function, it will not be returned by POSTman.

#### **Using Property Address to create Name Addresses for New Names**

Where sites are using the Auto Address Creation function within Transfer of Ownership and Property Names Maintenance (i.e.: flag checked on for LPA 0, LPA 1, LPA 6 Role Types in Name and Address Role Type

Parameters), the validation with POSTman occurs silently. If the address is a direct match the DPID will be applied to the new address. If POSTman does not find a direct match for the address, it will be created anyway but without the DPID details. If the User details out on the Address from the Names maintenance forms, it will perform the validation in POSTman. This same validation will occur if this action is taken at any time in the future and of course the Refresh option will populate these addresses with DPID details or provide near match details in the report.

**Summary:**

All new addresses are validated in POSTman, and all Searches are performed over Pathway.

The situations where an address is not located, would be where a new sub-division has occurred somewhere in Australia and the address details are not included in the PAF file in use by POSTman

Or

Where a customer is using a suburb name that is not the approved suburb name

Or

Where a customer is using a house identifier that is not the approved house identifier in that street.

Any addresses that are created outside of a match with POSTman, will be re-validated when the next Refresh is performed (this would be expected each time the new PAF file is made available). If it is still not a valid address, it will be reported on via the Detail Report in the Refresh process. Council can review those addresses if they wish, or leave as non matched.

## Modules Included in POSTman Interface

The following modules and functions have been included in the POSTman interface. All entities have been updated to cater for ALL available Fields.

- DPID            Delivery Point Identifier
- DPBarcode Barcode
- BSP            Barcode sort plan

CRPNA04	Name and address Export
CRPNA06	Name and Address Import
LRPRA14	Rates Notice/Instalment Notice/Reminder Notice
LRPRA23	Supplementary Rates Notice
LRPWB01	Water Usage Notice
LRPTW20	Trade Waste Notice
LRPAN07	Animal Renewals

CWP            Merge Documents

As part of the System Merge Fields in CWP, the following fields are now available within any Merge Type document created from any module.

- DPID            Delivery Point Identifier
- DPBarcode Barcode
- BSP            Barcode sort plan

As such, any notices, letters issued in Pathway, will contain the relevant DPID information, where the Address has been validated by the POSTman interface.

### Important Information

To ensure consistency and efficiency in the POSTman interface, it is strongly recommended that sites perform Duplicate Component Merge over Streets, Suburbs, States and Postcodes.

It is preferable to have Streets merged, even where the Street is a different physical street, i.e.: To have one Street with multiple Suburbs.

In addition, sites should review their Street Qualifiers to ensure they do not have duplicates of these set up. For example:

Road	Abbreviation of Road
Rd	Abbreviation of Rd
Boulevard	Abbreviation of Blvd
Boulevard	Abbreviation of Blv
Boulevard	Abbreviation of Boulevard

Where these do exist, once the Street Merge is complete, any Qualifiers remaining, will no longer have Addresses linked and can therefore be deleted.